



Winter Wave Summary Report

*Part of the Washington State Transportation
Commission 2010 Ferry Research Initiative*



**Washington State
Transportation Commission**

Conducted by
Market Decisions Corporation
April-May 2010



Preface

- ❖ In 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). In the past, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG). FROG is an online community where ferry travelers will have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions).
- ❖ The research initiative in 2010 consists of the following main phases:
 - Spring Customer Survey (target audience: consumers)
 - Mode Shift and Elasticity of Demand Research (target audience: consumers)
 - Freight Survey (target audience: freight customers)
 - General Market Assessment Survey (target audience: consumers)
 - Summer customer Survey (target audience: consumers)
 - Capital Funding (target audience: consumers)
 - Fare Strategies (target audience: consumers)
- ❖ The focus of this report is the Spring Customer Survey.
 - A comprehensive report of all phases will be available fall 2010.
- ❖ All research was conducted by Market Decisions Corporation with input from the WSTC Research Team. For questions about this research, please contact Reema Griffith at WSTC ☎ (360) 705-7070.



Table of Contents

	<u>Page #</u>
❖ Methodology	4
❖ Executive Summary	5
❖ Detailed Study Findings	11
■ Winter Travel Activity	12
■ Conjoint Exercise	14
■ Fuel Surcharge	21
■ Higher Fares for Non-Residents	25
■ WSF Operating Costs	28
■ Summer Surcharge	31
■ Impact of Better Transit Services	34
■ San Juan Early/Late Week Discount	37
■ Feature Satisfaction	38
■ Factors Determining Ferry Travel	55
■ WSF Information Sources	58
■ Most Recent Ferry Trip	63
❖ Demographics	69
❖ Appendix A: Additional Conjoint Details	84
❖ Appendix B: Questionnaire	97
❖ Appendix C: Weighting	105



Methodology

- ❖ The following report presents the findings for the April 2010 survey. The main objective of this research is to understand from the ferry riders' perspective their travel behavior, opinions, and attitudes regarding important issues currently facing the Washington State Transportation Commission and Washington State Ferries.
 - This overall objective resulted in the following areas of exploration:
 - Winter travel activity - ferry travel from January 3 through March 27, 2010.
 - Tariff issues - gauge support of various options to manage vehicle demand and reduce congestion
 - Ferry operating costs - measure support of changes in ferry fares for out-of-state passengers and summer surcharge
 - Transit connections - determine impact of better transit connections on ferry travel
 - Service and amenity satisfaction - measure the satisfaction and importance of services and amenities offered on the ferries
 - Profiling ferry customers - travel patterns, WSF satisfaction and demographic data
- ❖ A total of four thousand one hundred seventy-two (n=4,172) ferry riders completed the April 2010 survey yielding a maximum sample variable of +/- 1.5% at the 95% confidence level.
 - A total of four thousand twenty-seven (n=4,027) ferry riders completed a web survey between April 6, 2010 and May 10, 2010.
 - A total of one hundred forty-four (n=144) paper surveys were completed between April 29, 2010 and May 28, 2010.
- ❖ In order to make the survey results proportionate to the ferry ridership universe as a whole, it was necessary to weight the data by route and boarding method based on their last trip taken.
 - For additional details please see Appendix C.
- ❖ Due to respondents who either did not answer certain questions or selected no response or don't know, the question bases vary throughout the report.
 - Small sample sizes, those n=30 or less, will be called out on each slide, if present.



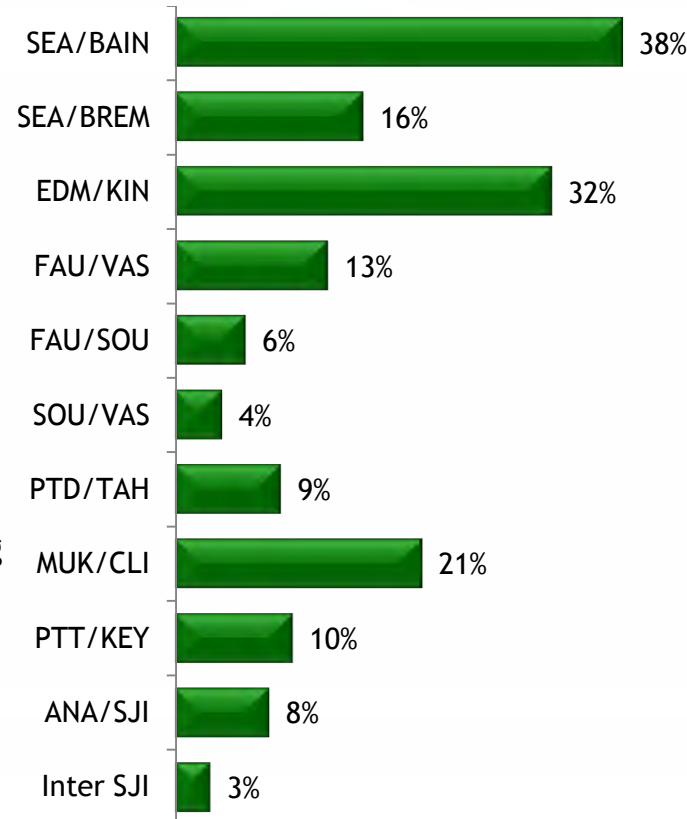
Executive Summary

❖ Winter Ridership

- Ferry ridership during the winter travel period is highest for the Seattle/Bainbridge (38%), Edmonds/Kingston (32%) and Mukilteo/Clinton (21%) routes and lowest on the Inter San Juan Island route (3%).
- The Fauntleroy/Vashon (13.5), Fauntleroy/Southworth (13.4), Mukilteo/Clinton (13.4), Seattle/Bremerton (13.1) and Seattle/Bainbridge (11.2) routes have ridership of, on average, more than 10 round trips per month during the winter period.
- Fauntleroy/Southworth and Seattle/Bremerton have the highest percentage of commuting trips per month (85%); whereas Port Townsend/Keystone and Anacortes/San Juan Islands have the lowest percentage (40%).

Route Ridership

(n=4,173)



Avg. # of trips per month per rider*

2010 2008

11.2	11.4
13.1	11.9
7.6	8.0
13.5	15.4
13.4	10.8
5.6	
6.5	14.4
13.4	10.0
3.0	5.7
4.2	2.7
4.0	n/a

* Please note the question wording was changed slightly between 2008 and 2010



Executive Summary *(cont.)*

❖ Conjoint Results

- The attributes varied in importance depending on whether respondents were being asked how supportive they would be of the options or how each might impact their peak period vehicle usage on the ferry.
 - Of the three options tested (Small-car discount; off-peak vehicle discount; and larger fare increases for vehicles), the off-peak vehicle discount had the most impact on potential behavioral change as well as being the option out of the three with the greatest level of general support.
 - The option "Larger fare increases (actual increase amount was not specified) for vehicles than passengers" did not garnish much support or impact on a respondents movement to off peak drive-on.
 - There are no significant differences in response for these two options by boarding mode.
- Overall, nearly four out of ten (38%) picked a response in the conjoint exercise that indicated, if one of the scenarios were implemented, they would either walk on more or shift vehicle trips to the off-peak period when the off-peak vehicle discount was included in a profile.
 - The percent who would walk-on more is very small, averaging just 3%.



Executive Summary *(cont.)*

❖ Fuel Surcharge

- More than half (55%) of ferry riders are against adding a fuel surcharge to recoup some of the costs of higher than expected fuel cost; however, one third (33%) of ferry riders are in support of implementing the fuel surcharge.
 - Those who travel primarily for work or school are more strongly opposed to the fuel surcharge than those who travel for other purposes.
- If a fuel surcharge were implemented, capping the surcharge at 20% of the fare or applying it across all fares equally are the preferred methods (44% and 45%, respectively).

❖ Higher Fares for Non-Residents

- Roughly one third (30%) of ferry riders are in support of introducing a higher fare on single trips for out-of-state ferry passengers, proposing an average fare increase of 22% for non-residents.
 - Of those in support of the program, three fifths (61%) remain supportive given the extra time that may be needed to verify residency.

❖ Summer Surcharge

- Ferry riders don't have a strong preference for or against summer surcharges. Ferry riders lean towards implementing the summer surcharge on either the single-trip vehicle fare only OR on all other fare types (includes multi-ride fares), but not a small increase on both.
 - A different way of stating this is, more than half of ferry riders want the surcharge shared by all riders.



Executive Summary (cont.)

❖ WSF Operational Costs

- On average, riders who offered a guess at the percentage of ferry fare coverage, believe that ferry fares cover 58% of the WSF's annual operational costs, whereas they actually cover 66%.
- Half (50%) of ferry riders agree that two-thirds is an appropriate amount; however, over one third (35%) feel that ferry fares should cover a lower percentage of operating costs and more gas tax dollars should be diverted from currently planned statewide transportation activities to support ferry operational costs.
 - However, it should be noted that 15% are willing to pay a higher percentage of operating costs.

❖ Transit Connections

- More than one third (36%) of ferry riders would change their peak walk-on behavior if “better transit services and more reliable connections” were available. Those 36% of ferry riders would increase their peak walk-on trips by an average of 37%.
 - Walk-on riders are more likely than drive-on riders to alter the behavior and walk on more often is better transit connections were available
 - One quarter of ferry riders currently “always walk on” during peak periods.

❖ Early Week Discount

- Four in five (79%) San Juan ferry riders state that the early/late week fare structure has no influence on the days of the week they travel; however, nearly half (48%) are against eliminating the discount.



Executive Summary *(cont.)*

❖ Ferry Feature & Service Satisfaction

- Overall, satisfaction levels for the services and amenities that ferry riders find most important are high.
 - Based on the gap analysis, which looks at the relative satisfaction and the relative importance of each feature, interactions with vessel and terminal personnel are the two areas of greatest opportunity for improvement.
- Of the on-board, more than two thirds (68%) of ferry riders use the galley services and amenities offered service and nearly half (48%) use the information provided in the information center.
 - Roughly one fifth (16%) of ferry riders do not use any offered services or amenities.
- Three fourths of ferry riders show interest in expanded galley offerings; however, the majority of ferry riders show no interest in live entertainment (56%), a children's play area (59%) or additional retail services (55%).
- Three in five (58%) ferry riders state that there are no additional on-board services or amenities they would like to see offered on the ferry.
 - Of these who did offer suggestions, the main services they would like to see are free or cheaper WiFi (20%) and better coffee and food options (13% and 12%, respectively).



Executive Summary *(cont.)*

❖ Ferry Travel

- Faster travel time to take the ferry is the main factor in deciding to take the ferry (45%) and long lines waiting to catch the ferry (38%) is the primary reason in deciding to drive around.
- Three fifths (60%) of riders who drive onto the ferries, drive a vehicle longer than 14' in length.

❖ WSF Information

- To obtain information about Washington State Ferries, three quarters (73%) of ferry riders use the WSF website.
- If available, over one third (37%) would use highway advisory radio for WSF information, primarily those on the Edmonds/Kingston and Mukilteo/Clinton routes.

❖ Last Ferry Ride

- On their last ferry trip, two fifths (39%) of riders used it to commute to and from work.
 - The percentage of trips for recreation/tourism has decreased significantly since 2008, whereas the percentage of trips for commuting to and from work has increased.
- Two thirds of ferry riders boarded the ferry as either a driver or passenger in a vehicle and more than one quarter walked-on.
 - The percentage of walk-on passengers has decreased significantly since 2008, while drive on ridership has increased.



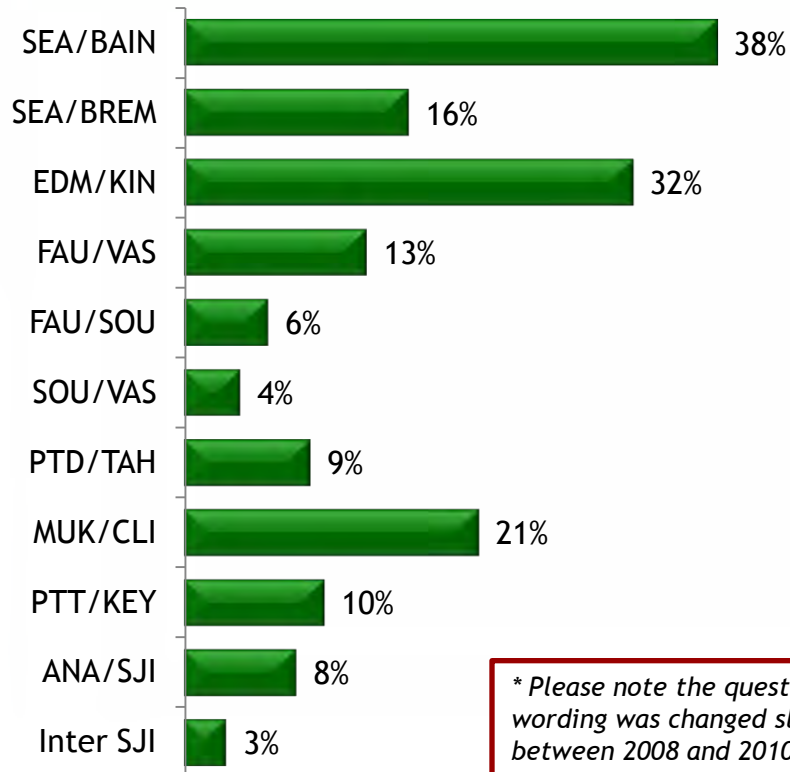
Detailed Study Findings



Winter Period Ridership - Overall

- ❖ The routes with the highest ridership during the winter period are Seattle/Bainbridge (38%), Edmonds/Kingston (32%) and Mukilteo/Canton (21%).

Route Ridership (n=4,173)



* Please note the question wording was changed slightly between 2008 and 2010

Avg. # of trips per month per rider*		Seasonality Index 1 st Qtr	
2010	2008	2010	2009
11.2	11.4	0.99	1.04
13.1	11.9	1.06	1.00
7.6	8.0	1.05	1.04
13.5	15.4	1.02	1.05
13.4	10.8	0.96	1.07
5.6		1.01	1.10
6.5	14.4	1.02	0.98
13.4	10.0	1.04	1.02
3.0	5.7	0.87	0.54
4.2	2.7	0.69	0.75
4.0	n/a	1.71	1.01

S1 For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 3rd through March 27th. For the routes shown below, how many round trips (two one-way trips = one round trip) per month do you take, on average, during the Winter Schedule period?

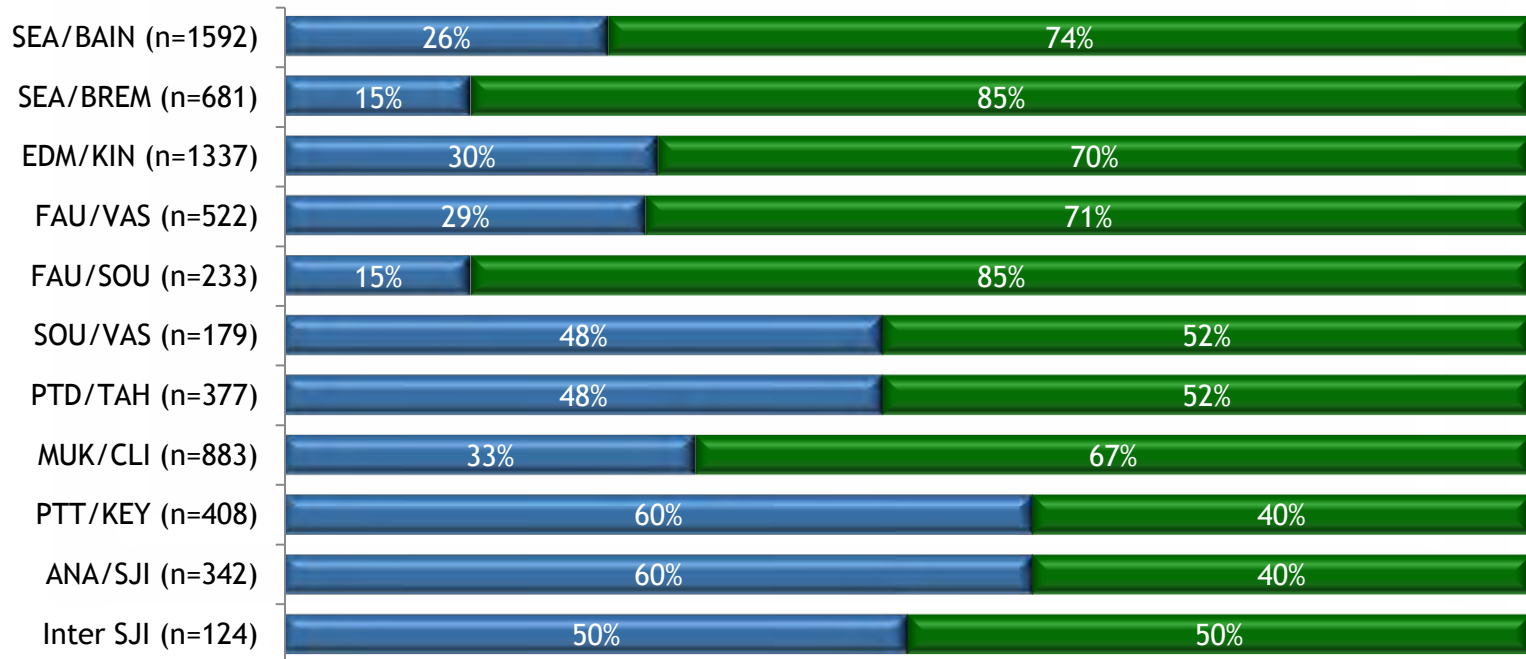


Winter Period Ridership - Commuting Trips

- ❖ Fauntleroy/Southworth and Seattle/Bremerton have the highest percentage of commuting trips per month (85%); whereas Port Townsend/Keystone and Anacortes/San Juan Islands have the lowest percentage (40%).

Ratio of Commuting Trips Per Month (of those who ride route)

■ Purposes other than commuting ■ Primarily for commuting



S2 For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 3rd through March 27th. How many of those trips were for primarily commuting (getting to and from work/school) purposes?



Conjoint Exercise

- ❖ The 2010 WSTC April Ferries survey included a conjoint exercise designed to assess the potential efficacy of three different alternative approaches to manage vehicle demand and reduce congestion in peak travel periods on the ferry system:
 - Discounts for vehicles significantly under the current 20-foot standard length (so we can carry more vehicles per ferry). The discounts would vary by vehicle length, with different discounts for vehicles...
 - ...14' or less in length (such as a Kia Rio, Hyundai Accent, VW Beetle)
 - ...13' or less in length (such as a Pontiac G3, Mini Cooper, Toyota Yaris)
 - ...12' or less in length (such as a Smart Car)
 - Discounts for taking vehicle trips during off-peak periods; (to reduce vehicle wait time at peak hours); and
 - Larger increases in vehicle fares, than for passenger fares (to encourage more car pooling and walk-on passengers).
- ❖ Respondents were asked to rate each of nine different combinations of these three attributes on two scales:
 - How supportive they would be of using each potential option set to reduce peak vehicle demand; and
 - How the option set might impact their peak period vehicle usage on the ferry if it was enacted.
 - Respondents who said the option sets would have no impact as they don't take a vehicle on the ferry during peak hours were not asked the second question.
- ❖ The complete set of profiles seen by each respondent is shown on the following page.



Conjoint Profiles

	Option 1	Option 2	Option 3
Small-car discount	A 35% discount for vehicles 13' or less in length	A 40% discount for vehicles 12' or less in length	A 35% discount for vehicles 13' or less in length
Off-peak vehicle discount	A 25% off-peak vehicle discount offered	A 25% off-peak vehicle discount offered	No off-peak vehicle discount
Larger fare increases for vehicles	No, when fares increase the percent increase is the same for both vehicles and passengers	No, when fares increase the percent increase is the same for both vehicles and passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers
	Option 4	Option 5	Option 6
Small-car discount	A 35% discount for vehicles 13' or less in length	A 30% discount for vehicles 14' or less in length	A 30% discount for vehicles 14' or less in length
Off-peak vehicle discount	A 25% off-peak vehicle discount offered	No off-peak vehicle discount	A 25% off-peak vehicle discount offered
Larger fare increases for vehicles	Yes, when fares increase, vehicle fares increase by a higher percent than passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers
	Option 7	Option 8	Option 9
Small-car discount	A 30% discount for vehicles 14' or less in length	A 40% discount for vehicles 12' or less in length	A 40% discount for vehicles 12' or less in length
Off-peak vehicle discount	No off-peak vehicle discount	No off-peak vehicle discount	A 25% Off-peak vehicle discount offered
Larger fare increases for vehicles	No, when fares increase the percent increase is the same for both vehicles and passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers



Importance of the Attributes

- ❖ The attributes varied in importance depending whether respondents were being asked how supportive they would be of the options or how each might impact their peak period vehicle usage on the ferry.

- The off-peak vehicle discount was the primary driver of potential behavior change as well as the option with the greatest level of support.
- Larger fare increases for vehicles than passengers had little impact on either measure.
- There are no significant differences by boarding mode.

- ❖ Overall, nearly four out of ten (38%) said they would either walk on more or shift vehicle trips to the off-peak period when the off-peak vehicle discount was included in a profile.
 - The percent who would walk-on more is very small, averaging just 3%.

Small-car discount

25%

22%

Off-peak vehicle discount

65%

72%

Larger fare increases for vehicles

11%

6%

“Importance” is the measure of how much preference changes with changes in an attribute. If something is unimportant, respondents will tend to rate a profile the same whether it’s present or not; conversely, “important” attributes are those where changes to the attribute result in larger changes in preference.

■ Behavioral Change

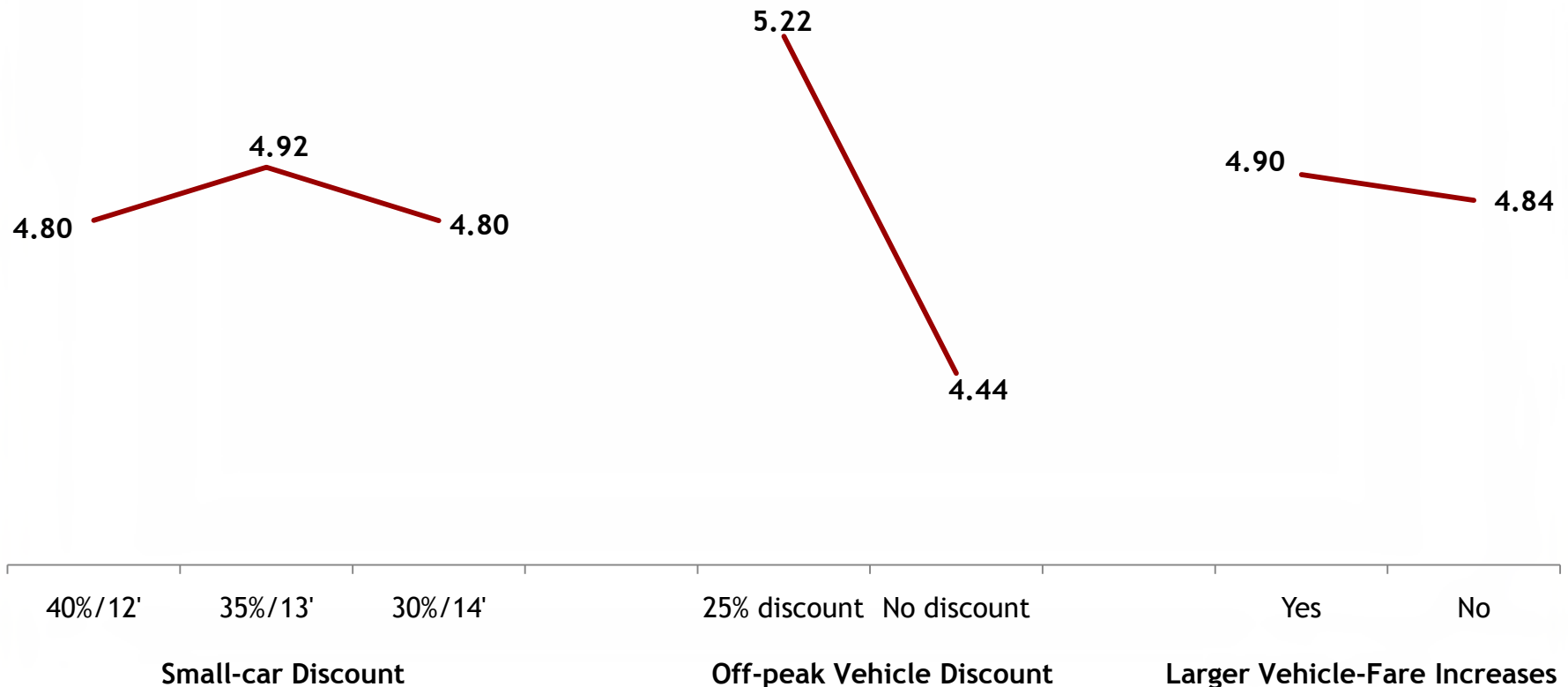
■ Support



Preferences for Options - Support

- ❖ While the preference for an off-peak vehicle discount is clear, respondents are slightly more drawn to the midpoint of the small-car discounts. The figures are the average support ratings (9-pt scale).

Preferences for Options

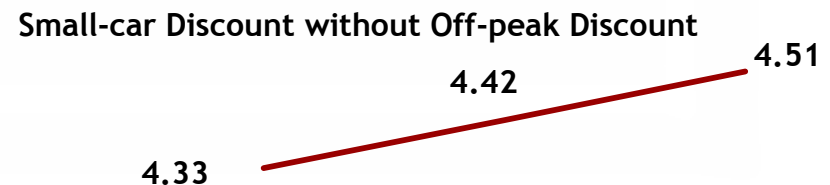
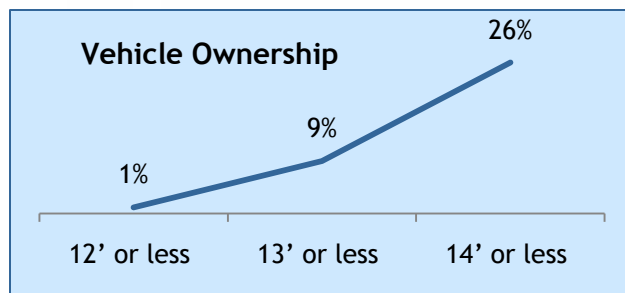
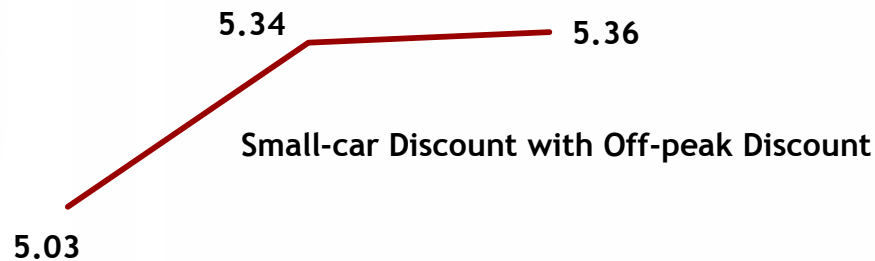




Preferences for Options - Support

- ❖ The combination of a small-car discount with an off-peak discount results in preference curves that more closely match the distribution of these vehicle sizes among the respondents.

2nd-Level Interactions: Small-car Discount + Off-peak Discount



40%/12' + 25% 35%/13' + 25% 30%/14' + 25%

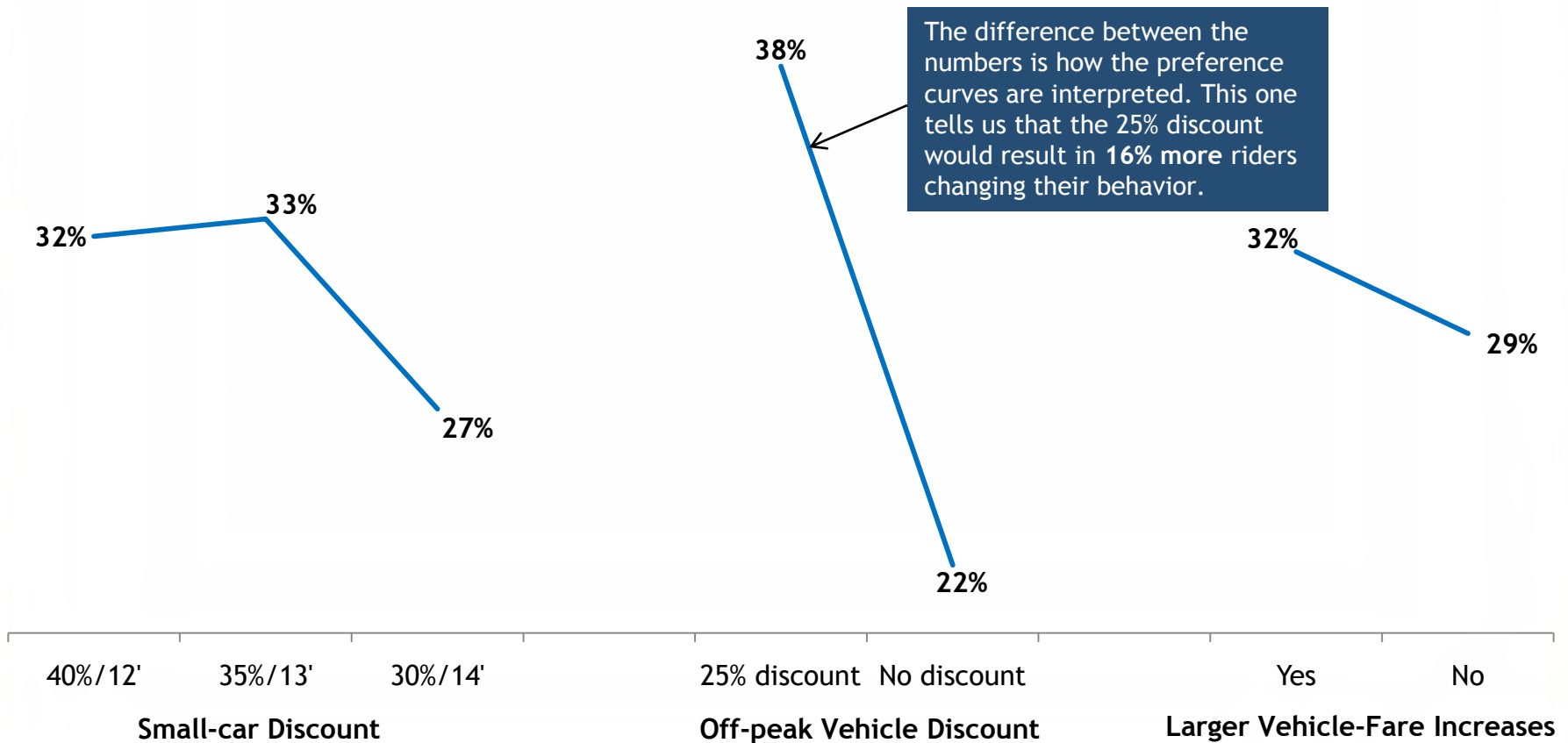
40%/12' + no 35%/13' + no 30%/14' + no



Preferences for Options - Behavior

- ❖ Respondents are generally indifferent between the 12' and 13' car-length discounts, but are not motivated by the discount for cars 14' or less.

Would Change Behavior

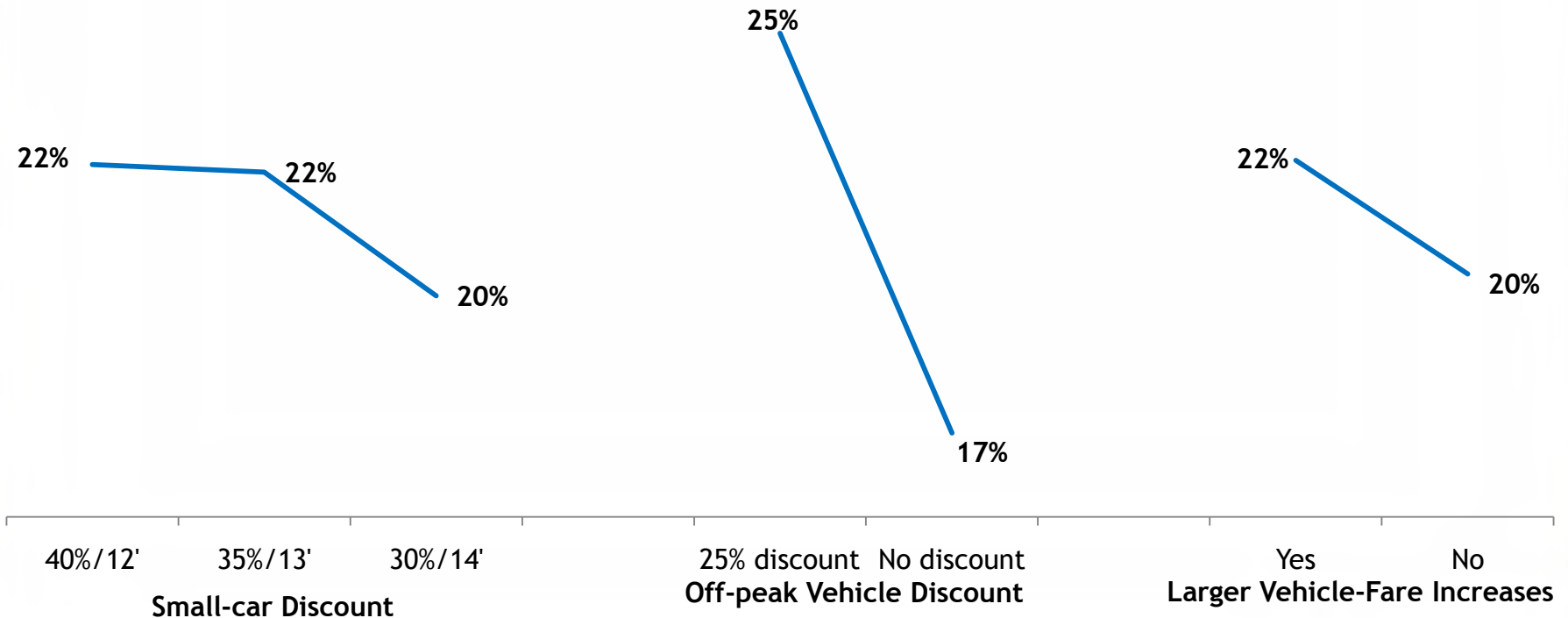




Preferences for Options - Behavior *Commuters Only*

- ❖ Commuters are substantially less likely to change their behavior than other riders (21%, vs. 38% overall).

Would Change Behavior: *Commuters*

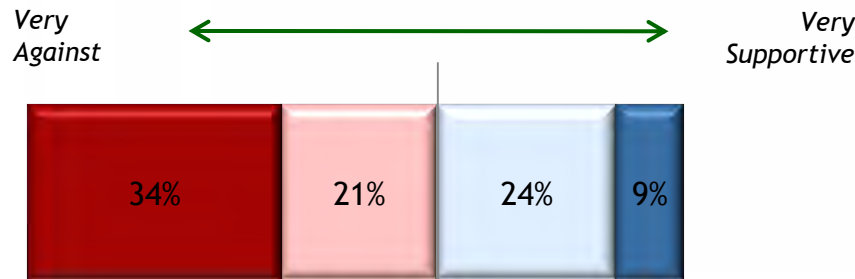




Fuel Surcharge

- ❖ More than half (55%) are **against** the fuel surcharge to recoup some of the costs of higher than expected fuel cost; however, one third (33%) of ferry riders are in support of implementing the fuel surcharge.
- ❖ **Capping the surcharge at 20% of the fare and applying it across all fares equally** is the preferred implementation method (44% and 45%, respectively.)
- ❖ Those who travel primarily for work or school are more strongly opposed to the fuel surcharge than those who travel for other purposes.

Fuel Surcharge Support (n=4134)



Only ratings of support (4-5) or lack of support (1-2) are shown.
Ratings of 3 or don't know are not shown.

- Q3 How supportive would you be of a fuel surcharge on ferry fares to recoup some of the cost of higher than expected fuel costs?
- Q4 Which of these do you feel would be the best way to set a maximum amount on the surcharge?
- Q5 Which of these do you feel would be the most appropriate way for the surcharge to be applied?

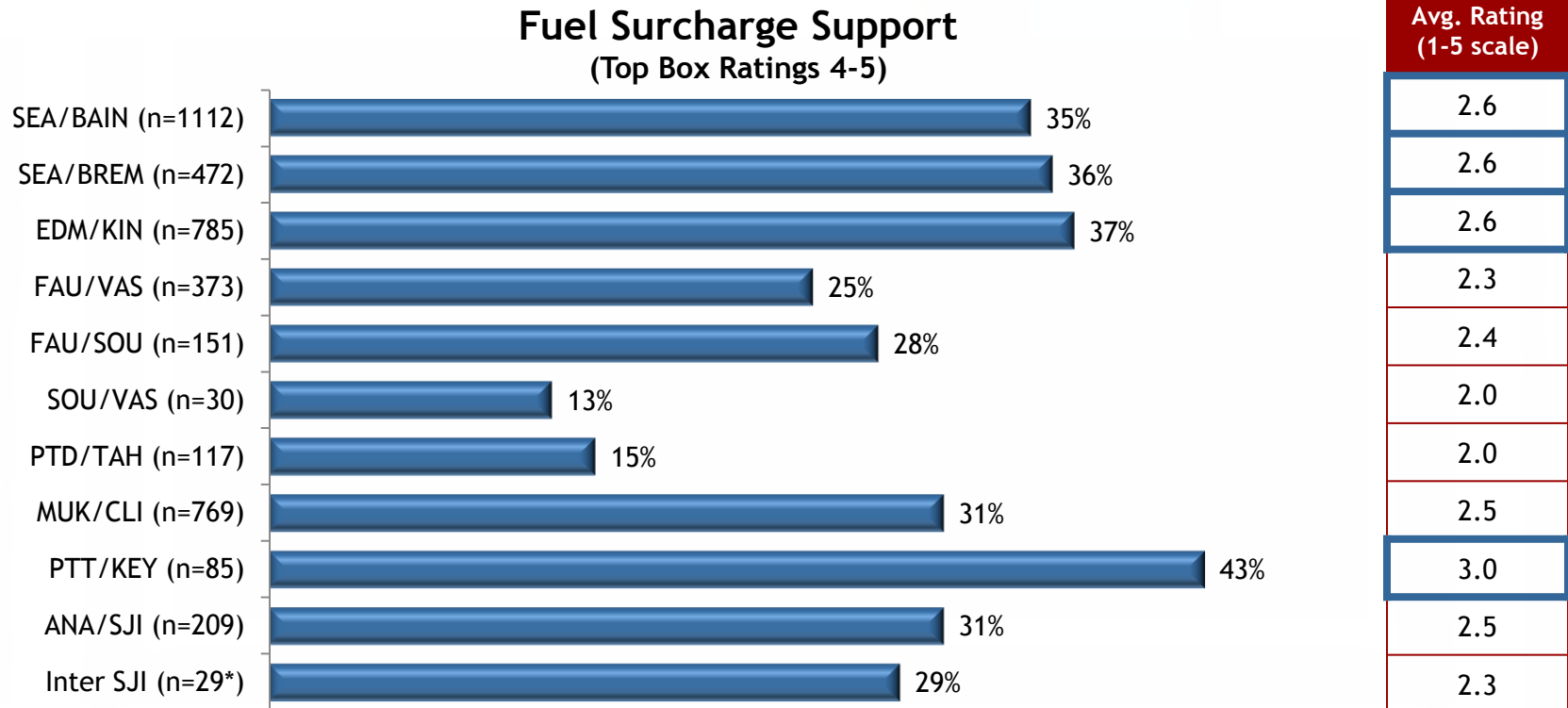
Fuel Surcharge Maximum	Total n=4173
Capped at 20% of the fare regardless of how much it covers extra fuel costs	44%
Capped at \$5 above base fare regardless of how much it covers extra fuel costs	20%
No maximum amount; the surcharge should cover the extra cost of fuel	11%
Don't know	25%

Fuel Surcharge Implementation	Total n=3891
Apply it across all fares (on both vehicle & passenger) equally	45%
Apply it to vehicles only (on both single and discounted multiple vehicle fares)	31%
Apply it to all single-trip fares (discounted multiple fares would not be charged the surcharge)	24%



Fuel Surcharge - By route

- ❖ Support for the fuel surcharge is highest for the Seattle Bainbridge, Seattle/Bremerton, Edmonds/Kingston and Port Townsend/Keystone riders.



* Caution: Small sample sizes

- Q3 Currently, when fuel prices go higher than what was funded in the State budget the extra cost of fuel is often paid for by taking money away from other planned transportation activities statewide. How supportive would you be of a fuel surcharge on ferry fares to recoup some of the cost of higher than expected fuel costs? (1=Very against; 5=Very supportive)



Fuel Surcharge Maximum - By route

- ❖ With the exception of Anacortes/San Juan Islands and Inter San Juan Island riders, everyone agrees that **capping the fuel surcharge at 20%** is the best way to set the maximum surcharge fare.
 - Anacortes/San Juan and Inter San Juan Island riders prefer the maximum fuel surcharge to be capped at **\$5 above the base fare**.

Fuel Surcharge Maximum	SEA/ BAIN n=1121	SEA/ BREM n=476	EDM/ KIN n=795	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS N=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=210	INTER SJI n=29*
It should be capped at 20% of the fare regardless of how much it covers extra fuel costs	44%	46%	40%	48%	46%	38%	44%	51%	42%	18%	26%
It should be capped at \$5 above the base fare regardless of how much it covers extra fuel costs	18%	19%	21%	20%	21%	18%	20%	13%	15%	48%	50%
There should be no maximum amount ; the surcharge should cover the extra cost of fuel	13%	11%	12%	9%	8%	14%	7%	11%	16%	12%	4%
Don't know	26%	24%	27%	23%	24%	30%	29%	25%	27%	21%	20%

* Caution: Small sample sizes

Q4 If a fuel surcharge were implemented and a cap was needed to limit how high it could go, which of these do you feel would be the best way to set a maximum amount on the surcharge?



Surcharge Implementation - By route

- ❖ With the exception of Seattle/Bremerton and Inter San Juan Island riders, ferry riders prefer implementing the fuel surcharge **across all fares equally**.
 - Seattle/Bremerton riders prefer to apply the fare to **vehicles only**, while Inter San Juan riders prefer applying it to **all single-trip fares**.
- ❖ However, there is a high number of riders on the Seattle/Bainbridge and Port Townsend/ Keystone routes who also feel strongly for applying the fuel surcharge to **vehicles only**.
- ❖ Those who drive onto the ferries are more likely to support the applying the fuel surcharge across all fares; whereas those who walk or bike on prefer applying the surcharge to vehicles only.

Fuel Surcharge Implementation (of those responding)	SEA/ BAIN n=1051	SEA/ BREM n=446	EDM/ KIN n=735	FAU/ VAS n=350	FAU/ SOU n=140	SOU/ VAS n=27*	PTD/ TAH n=105	MUK/ CLI n=729	PTT/ KEY n=78	ANA/ SJI n=201	INTER SJI n=29*
Apply it across all fares (on both vehicle & passenger) equally	45%	40%	47%	39%	54%	53%	48%	44%	51%	40%	34%
Apply it to vehicles only (on both single and discounted multiple vehicle fares)	35%	43%	30%	29%	26%	18%	19%	27%	41%	21%	15%
Apply it to all single-trip fares (discounted multiple fares would not be charged the surcharge)	19%	17%	23%	32%	20%	29%	33%	29%	8%	39%	51%

* Caution: Small sample sizes

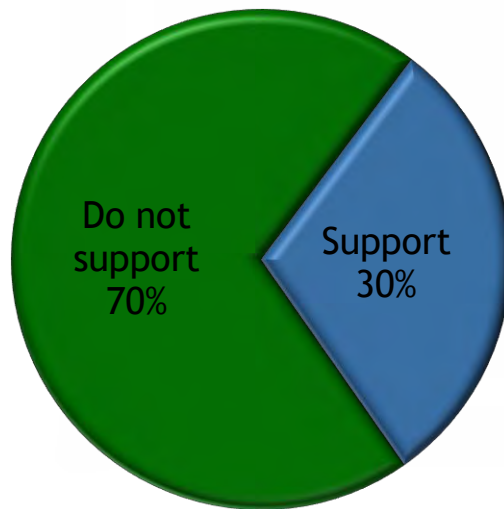
Q5 If a fuel surcharge were implemented and these were your three options, which of these do you feel would be the most appropriate way for the surcharge to be applied?



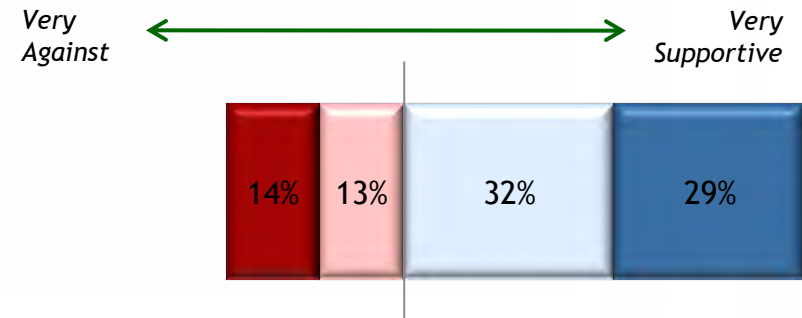
Higher Fares for Non-Residents

- ❖ Roughly one third (30%) of ferry riders **support** introducing higher fares for out-of-state ferry passengers.
- ❖ Those in support of higher fares for non-residents, propose that non-residents be charged, on average, **22% more** than residents for ferry travel.
- ❖ Three fifths (61%) of those who were initially in support of higher fares for non-residents, remain supportive of the program given the extra time that may be needed to verify residency.

Higher Fares for Non-Residents
(n=3,995)



Support Given Extra Time Needed
(n=1,199)



Only ratings of support (4-5) or lack of support (1-2) are shown.
Ratings of 3 or don't know are not shown.

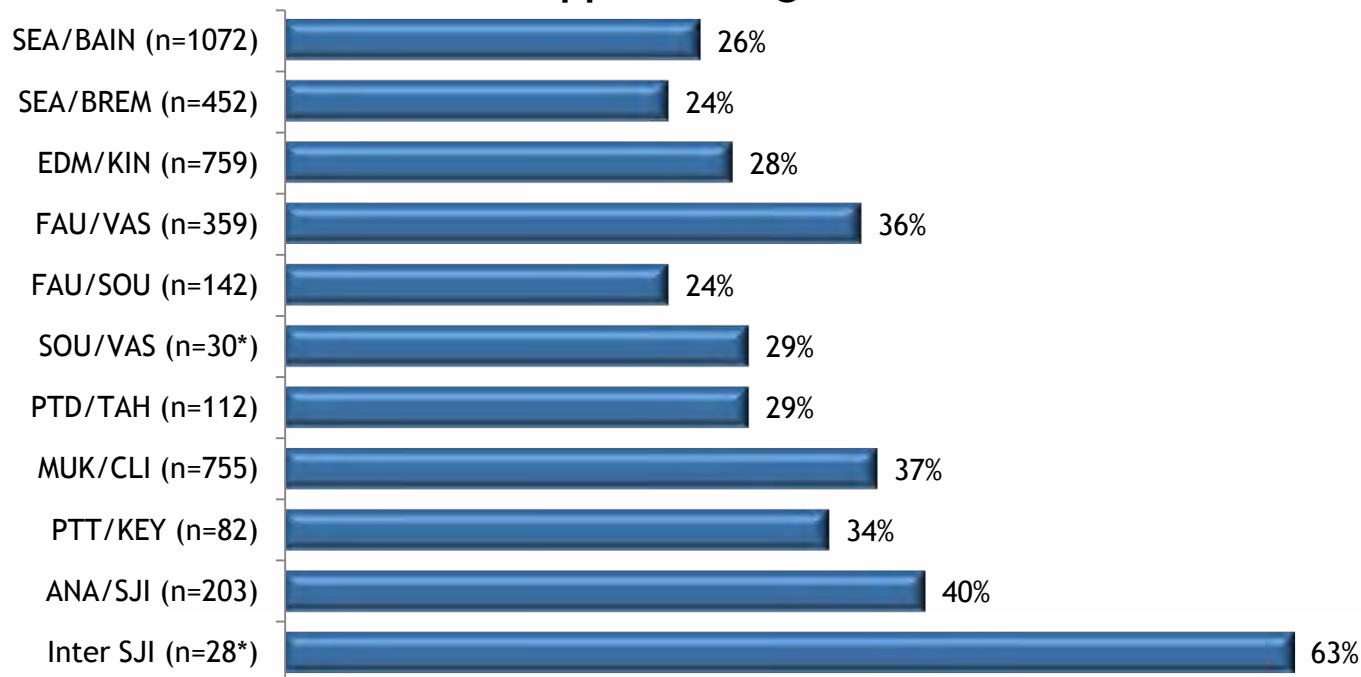
- Q6 How you would feel about introducing higher fares for out-of-state ferry passengers?
Q7 What percent more should non-residents be charged than residents for ferry travel?
Q8 How supportive would you be of this type of program given that extra time could be needed to verify residency?



Higher Fares for Non-Residents - By route

- ❖ Riders on the Anacortes/San Juan and Inter San Juan routes are most in support of higher rates for out-of-state ferry passengers, which is likely related to the higher number of recreational travelers during the summer months.

Percent in Support of Higher Fares for Non-Residents



* Caution: Small sample sizes

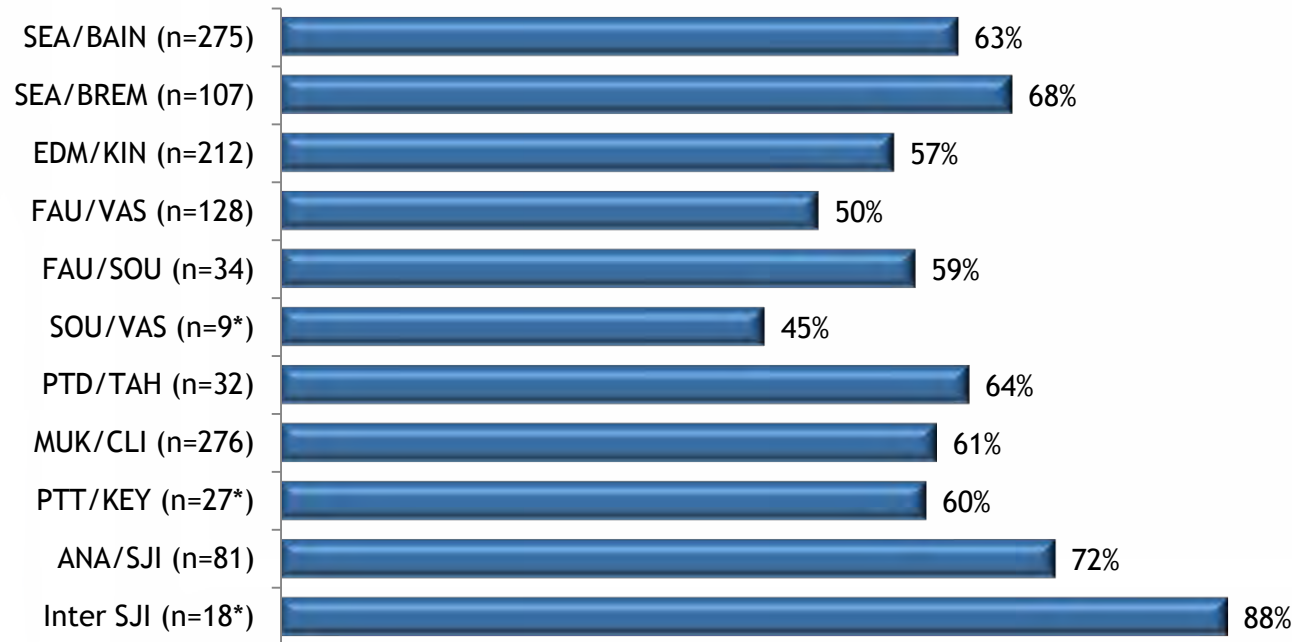
- Q6 *There are many public services such as golf courses, public pools, parks, etc. where Washington State residents pay a lower fee than non-residents. However, imposing non-resident fees can negatively impact tourism. Also, non-resident riders typically pay the highest single trip fare already during the peak summer season. Based on this information, which of these statements best describes how you would feel about introducing higher fares for out-of-state ferry passengers?*



Non-Resident Fees & Support - By route

- ❖ Riders on the Inter San Juan route remain most supportive of the higher fares for non-residents given the potential for longer wait times to verify place of residence.

Higher Non-Resident Fare Support Given Extra Time Needed (Top Box Ratings 4-5)



% Increase Charged of Non-residents (average/median)

23% / 21%

27% / 21%

22% / 21%

18% / 18%

16% / 16%

25% / 20%

22% / 21%

24% / 23%

17% / 21%

21% / 20%

27% / 28%

- Q7 What percent more should non-residents be charged than residents for ferry travel?
- Q8 Introducing higher fares for out-of-state ferry passengers could add to wait times at the toll booth to verify each rider's place of residence. How supportive would you be of this type of program given that extra time could be needed to verify residency? (1=Very against; 5=Very supportive)

* Caution: Small sample sizes



Summer Surcharge

- ❖ Overall, ferry riders prefer the implementation of the summer surcharge increase to take place either solely on the single-trip vehicle fare or on all other fare types, but not a small increase on both.

Preference of Summer Surcharge Options on Non San Juan Routes	TOTAL n=3906
Increase the summer single-trip vehicle fare surcharge from 25% to 35% and not raise any other fare types	33%
Leave summer single-trip vehicle fare surcharge at 25% and increase all other fare types by 2.5%	32%
Increase summer single-trip vehicle fare surcharge from 25% to 30% and increase all other fares by 1.25%	23%
No opinion/couldn't say	13%

Preference of Summer Surcharge Options on San Juan Routes	TOTAL n=352
Increase summer single-trip vehicle fare surcharge from 35% to 45% and not raise any other fare types	32%
Leave summer single-trip vehicle fare surcharge at 35% and increase all other fare types by 2.5%	33%
Increase summer single-trip vehicle fare surcharge from 35% to 40% and increase all other fare types by 1.25%	27%
No opinion/couldn't say	9%

Q9a/b The summer surcharge on single-trip vehicle fares has been 25% (the summer surcharge in the San Juan area on single-trip vehicle fares has been 35%), which means infrequent and recreational users pay a higher ticket price than those who use multi-ride discount tickets. The Transportation Commission is looking at three options for the summer surcharge program. Given the importance of tourism and keeping fares down while managing overall costs, which of the following options would you most prefer?



Summer Surcharge - Non San Juan Routes

- ❖ Riders on the Seattle/Bainbridge, Edmonds/Kingston and Port Townsend/Keystone are prefer leaving the summer single-trip vehicle fare surcharge at 25% and increasing all other fare types by 2.5%, whereas those on the other routes prefer increasing the summer single-trip vehicle fare surcharge from 25% to 35% and not raising any other fare types.

Preference of Summer Surcharge Options on Non San Juan Routes	SEA/ BAIN n=1102	SEA/ BREM n=464	EDM/ KIN n=780	FAU/ VAS n=373	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=769	PTT/ KEY n=81
Increase the summer single-trip vehicle fare surcharge from 25% to 35% and not raise any other fare types	29%	36%	28%	39%	35%	47%	42%	38%	23%
Leave summer single-trip vehicle fare surcharge at 25% and increase all other fare types by 2.5%	34%	27%	35%	25%	33%	27%	28%	28%	45%
Increase summer single-trip vehicle fare surcharge from 25% to 30% and increase all other fares by 1.25%	25%	23%	22%	24%	21%	11%	17%	22%	21%
No opinion/couldn't say	12%	14%	15%	11%	11%	15%	13%	11%	11%

Q9a *The summer surcharge on single-trip vehicle fares has been 25%, which means infrequent and recreational users pay a higher ticket price than those who use multi-ride discount tickets. The Transportation Commission is looking at three options for the summer surcharge program. Given the importance of tourism and keeping fares down while managing overall costs, which of the following options would you most prefer?*



Summer Surcharge - San Juan Routes

- ❖ Anacortes/San Juan Island riders are relatively evenly split across all three presented summer surcharge options.

Preference of Summer Surcharge Options on San Juan Routes	ANA/ SJI n=203	INTER SJ n=29*
Leave summer single-trip vehicle fare surcharge at 35% and increase all other fare types by 2.5%	27%	28%
Increase summer single-trip vehicle fare surcharge from 35% to 45% and not raise any other fare types	33%	48%
Increase summer single-trip vehicle fare surcharge from 35% to 40% and increase all other fare types by 1.25%	30%	24%
No opinion/couldn't say	10%	1%

* Caution: Small sample sizes

Q9b *The summer surcharge in the San Juan area on single-trip vehicle fares has been 35%, which means infrequent and recreational users pay a higher ticket price than those who use multi-ride discounts tickets. The Transportation Commission is looking at three options for the summer surcharge program. Given the importance of tourism and keeping fares down while managing overall costs, which of the following options would you most prefer?*

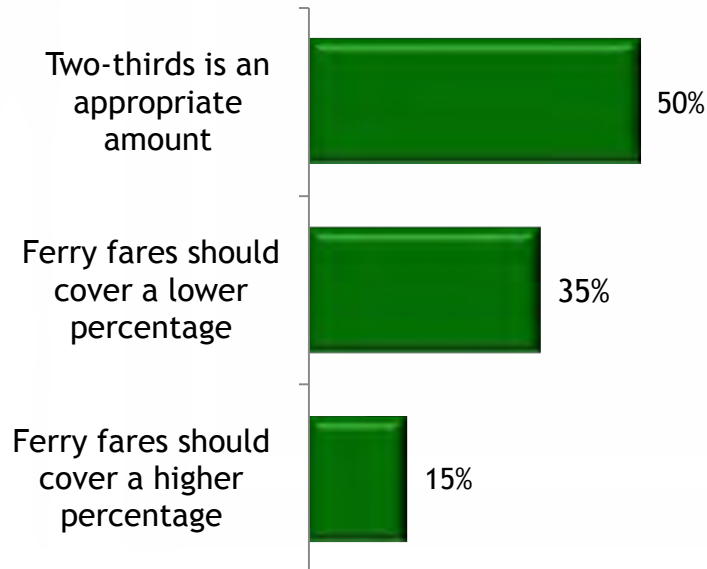


WSF Operational Costs

58% - Estimated ferry fare coverage of WSF's operational costs

35% - Don't know/couldn't say
(n=4,058)

Coverage of WSF's Operational Costs (n=3,896)



Q10 What percentage of WSF's annual operational costs do you think fares currently cover?

Q11 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

- ❖ Of the ferry riders who provided an estimate of the percentage of WSF's annual operational costs covered by ferry fares, the perception is **relatively close** to the actual number (58% vs. 66% actual).

- However, more than one third (35%) of riders stated that they didn't know or couldn't say.

- ❖ Once the actual percentage is revealed, half (50%) of ferry riders agreed that **two-thirds is an appropriate amount**.

- Over one third (35%) feel that ferry fares should cover a lower percentage of operating costs and more gas tax dollars should be diverted from currently planned statewide transportation activities to support ferry operational costs.

- ❖ Riders who always board the ferry by walking or biking are more likely to agree that two-thirds is an appropriate amount.



WSF Operational Costs - By route

- ❖ One in seven (15%) ferry riders feel that ferry fares should cover a higher percentage of operating costs (Seattle/Bremerton 20% and Port Townsend/Key Stone 30%).

Estimated Fare Coverage of WSF's Operations Costs	SEA/ BAIN n=1084	SEA/ BREM n=458	EDM/ KIN n=768	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=757	PTT/ KEY n=85	ANA/ SJI n=201	INTER SJI n=29*
Actual Fare Box Recovery Ratio (2009 Route Statements)	92%	48%	94%	53%			40%	84%	39%	43%	
Estimated Percentage / Median Percentage of WSF Operational Costs Fares Cover	56% / 53%	57% / 54%	59% / 60%	61% / 62%	57% / 56%	54% / 57%	60% / 61%	61% / 60%	54% / 51%	53% / 51%	63% / 54%
Don't know/couldn't say	32%	37%	33%	30%	35%	46%	43%	39%	43%	40%	19%
Actual Fare Coverage of WSF's Operations Costs	SEA/ BAIN n=1037	SEA/ BREM n=429	EDM/ KIN n=745	FAU/ VAS n=357	FAU/ SOU n=142	SOU/ VAS n=28*	PTD/ TAH n=112	MUK/ CLI n=743	PTT/ KEY n=79	ANA/ SJI n=198	INTER SJI n=25*
Two-thirds is an appropriate amount	48%	49%	49%	48%	60%	48%	44%	56%	48%	45%	41%
Should cover a <u>lower</u> percentage/more gas tax dollars should be diverted from planned transportation activities	37%	31%	34%	44%	27%	52%	53%	30%	22%	42%	47%
Should cover a <u>higher</u> percentage	15%	20%	17%	8%	13%	--	4%	13%	30%	13%	13%

Q10 What percentage of WSF's annual operational costs do you think fares currently cover?

* Caution: Small sample sizes

Q11 Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?



Transit Services Impact on Peak Travel

- ❖ More than one third (36%) of ferry riders, who travel during peak hours, **would change their boarding behavior** if “better transit services and more reliable connections” were available.
- ❖ Walk-on riders are more likely than drive-on riders to alter the behavior and walk on more often is better transit connections were available.

Impact of Better Transit Services & More Reliable Connections on Peak Trips

(n=3,502)



- On average, ferry riders would increase their peak walk-on trips by **37%** if “better transit services and more reliable connections” were available.
- Of these trips, **47%** would be for commuting purposes.

- Q12 What percent of your trips would you walk on during peak periods if better transit services and more reliable connections were available?
- Q14 Of the Q12% more walk-on trips you would make during peak periods if there were better transit services and more reliable connections, what percentage of the Q12% would be for commuting (getting to and from work/school)?

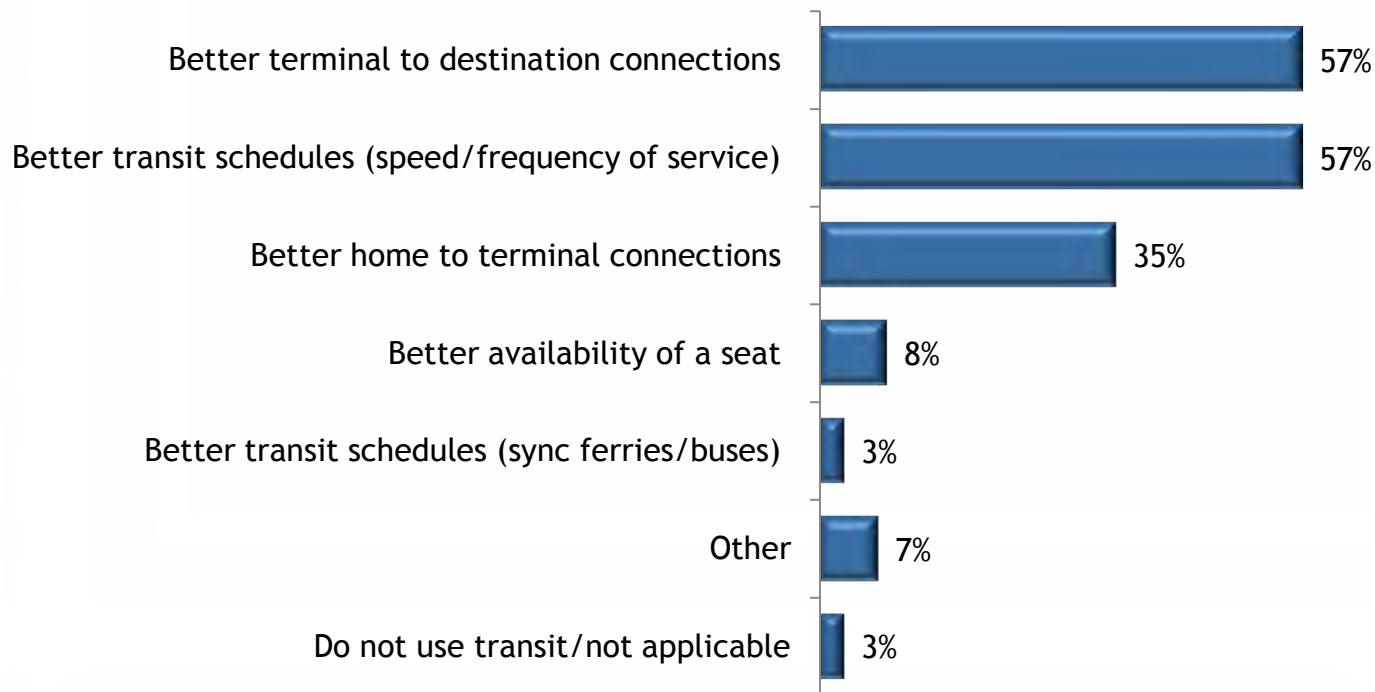


Defining “Better Transit Services & More Reliable Connections”

- ❖ Roughly three fifths (57%) of ferry riders relate **better terminal to destination connections** and **better transit schedules** to “better transit services and more reliable connections.”
 - It appears that more improvements are needed on destination side than the “home” side.

Better Transit Services & More Reliable Connections

(n=4,039)



Q13 What does “better transit services and more reliable connections” mean to you?



Transit Impact on Peak Travel - By route

- ❖ Riders on the Point Defiance/Tahlequah, Fauntleroy/Vashon and Mukilteo/Clinton are most likely to **change their walk-on behavior** if better transit services and more reliable connections were available.

Impact of "Better Transit Services and More Reliable Connections"	SEA/ BAIN n=971	SEA/ BREM n=411	EDM/ KIN n=647	FAU/ VAS n=320	FAU/ SOU n=124	SOU/ VAS n=27*	PTD/ TAH n=104	MUK/ CLI n=619	PTT/ KEY n=68	ANA/ SJI n=181	INTER SJI n=29*
Will change behavior	32%	24%	30%	47%	33%	16%	49%	46%	33%	43%	48%
Always walk on during peak periods	41%	57%	17%	15%	23%	35%	12%	12%	15%	7%	5%
Will not change behavior	12%	6%	28%	22%	21%	26%	23%	20%	26%	29%	20%
Don't know	15%	12%	25%	17%	24%	23%	16%	22%	25%	21%	27%
Percentage of Increase in Walk-on Trips for Commuting											
Average increase in walk-on trips	44%	58%	27%	36%	41%	19%	33%	36%	32%	24%	32%
Average increase in walk-on trips for commuting*	46%	57%	35%	60%	76%	96%	63%	49%	27%	20%	38%

* Caution: Small sample sizes

- Q12 What percent of your trips would you walk on during peak periods if better transit services and more reliable connections were available?
- Q14 Of the Q12% more walk-on trips you would make during peak periods if there were better transit services and more reliable connections, what percentage of the Q12% would be for commuting (getting to and from work/school)?



Defining “Better Transit Services & More Reliable Connections” - By route

- ❖ **Better home to terminal connections** is more strongly connected to “better transit services and more reliable connections” for riders of the Seattle/Bainbridge and Seattle/Bremerton routes.

Meaning of Better Transit Services and More Reliable Connections	SEA/ BAIN n=1084	SEA/ BREM n=458	EDM/ KIN n=768	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=757	PTT/ KEY n=85	ANA/ SJI n=201	INTER SJI n=29*
Better terminal to destination connections	53%	51%	56%	64%	60%	46%	61%	62%	60%	62%	70%
Better transit schedules (speed/frequency of service)	56%	63%	54%	61%	60%	73%	60%	52%	59%	56%	46%
Better home to terminal connections	41%	45%	34%	34%	36%	29%	31%	27%	33%	23%	10%
Better availability of a seat	9%	10%	6%	9%	11%	14%	6%	7%	7%	7%	<1%
Better transit schedules (sync ferries/buses)	3%	4%	2%	6%	5%	7%	5%	4%	2%	3%	1%
Other	5%	6%	6%	5%	7%	0%	7%	7%	8%	7%	3%
Do not use transit/not applicable	3%	1%	3%	3%	2%	0%	4%	3%	1%	3%	0%

* Caution: Small sample sizes

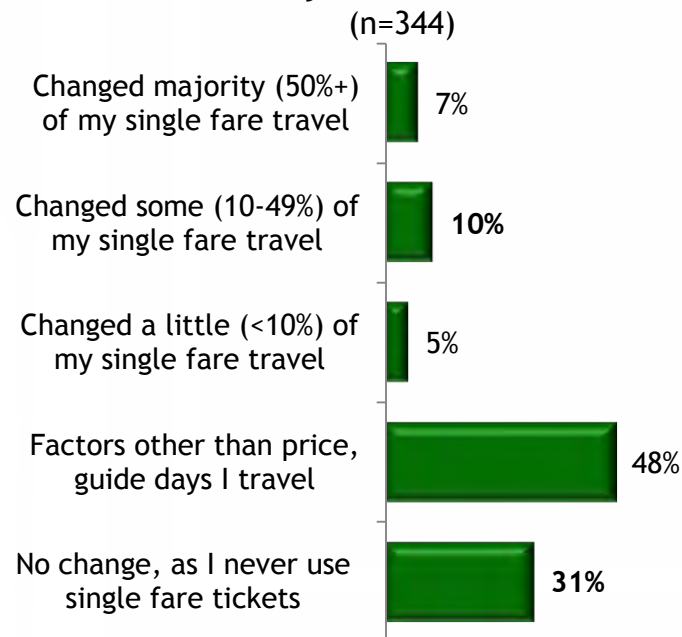
Q13 What does “better transit services and more reliable connections” mean to you?



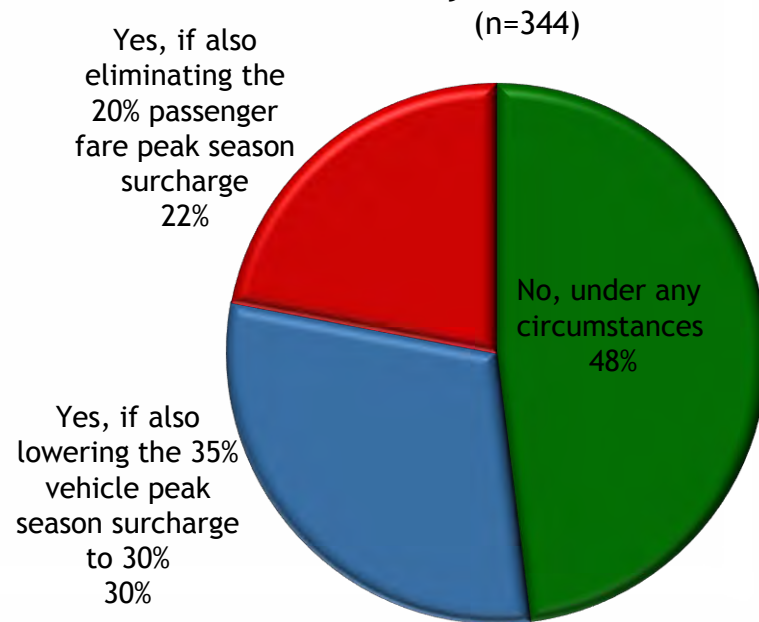
San Juan Early/Late Week Fares

- ❖ Nearly four in five (79%) San Juan ferry riders state that the early/late week fare structure has **no influence** on the days of the week they travel.
- ❖ Even though the majority are not influenced by the discount, approximately half (48%) are against eliminating the discount.

Influence of Early/Late Week Fare Structure



Elimination of Early/Late Week Fare Structure



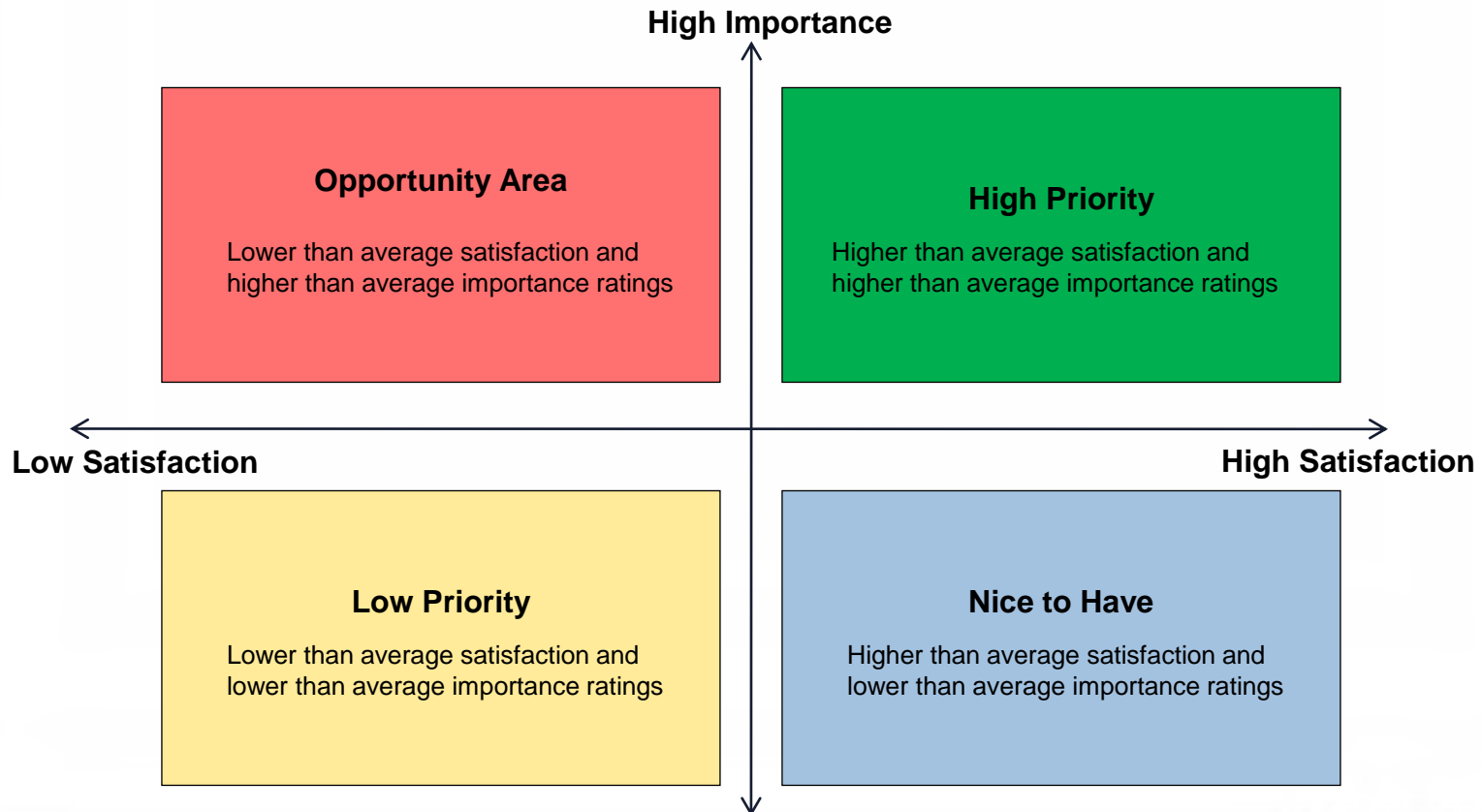
Q15a In the early 2000s, the Anacortes to San Juan Islands fares were modified to include a price differential for those that traveled early in the week versus later. Customers purchasing a single vehicle or passenger ticket pay less if they travel Sunday through Tuesday early week than if they travel Wednesday through Saturday late week. Customers utilizing multi-ride cards are not affected. Has this early / late week fare structure influenced the days of week that you travel?

Q15b Would you be in favor of eliminating the 10% early week discount Sunday through Tuesday for single fares?



Gap Analysis

- The following slide presents a quadrant chart outlining the relative importance of each ferry feature and the relative satisfaction of each feature.
- Features considered highly important, but with low satisfaction, indicate opportunity areas for the WSF. Increasing awareness of these important features may help promote more positive impressions of the ferry system, as well as boost overall satisfaction.

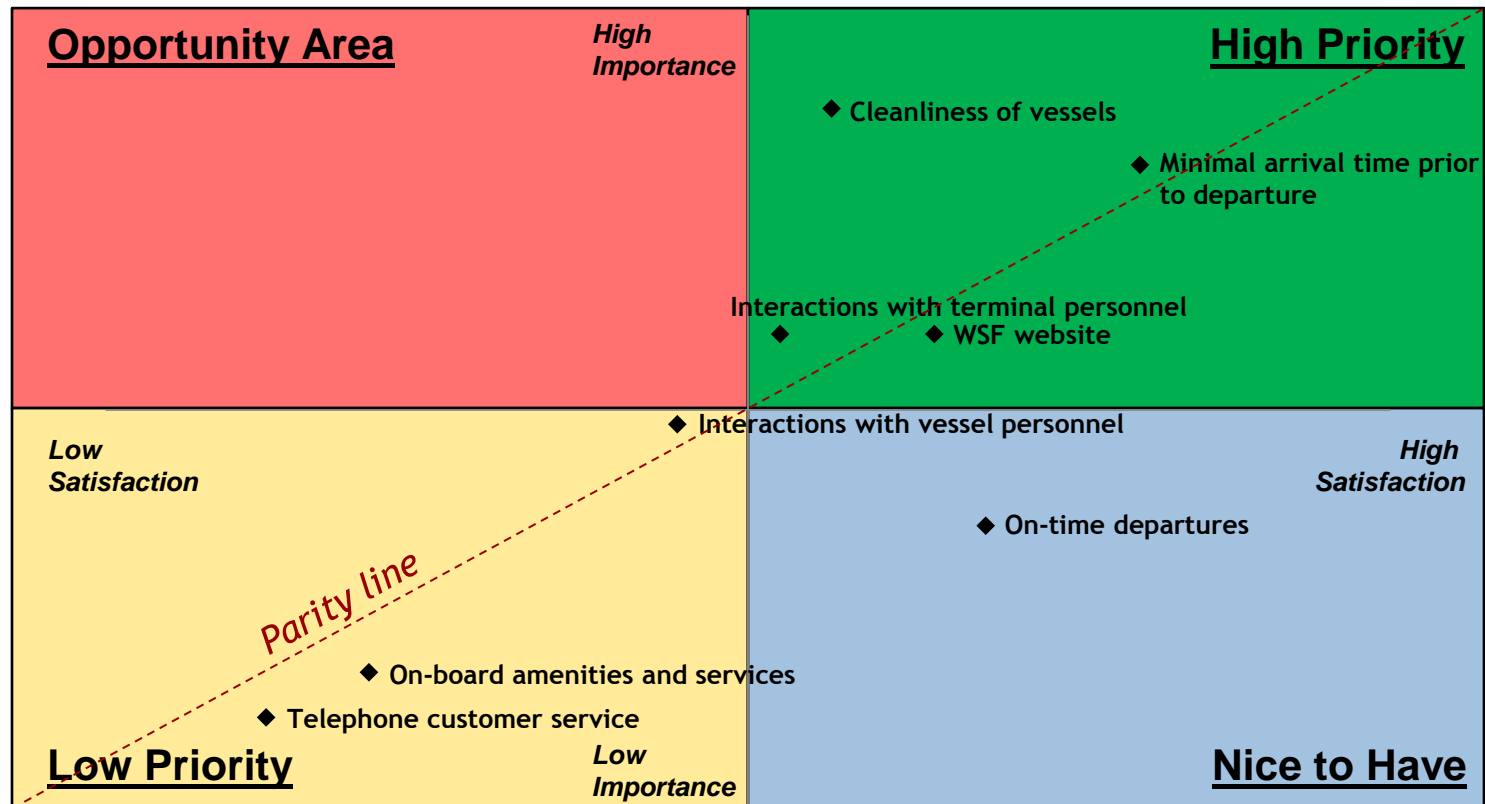




Gap Analysis

- ❖ Overall, ferry riders are satisfied with the features they consider most important.
- ❖ Interactions with vessel and terminal personnel are the two areas of greatest opportunity to improve.

Satisfaction vs. Importance Ratings





Ferry Feature Importance - By route

- ❖ Overall, **cleanliness of the vessels** and **minimal arrival time** are the top rated ferry feature based on importance.
- ❖ Riders on the **Seattle/Bainbridge** and **Seattle/Bremerton** routes rate the **on-board amenities and services** as more important than riders on other routes.

Top Box 4 & 5 Ratings	SEA/ BAIN n=1084	SEA/ BREM n=458	EDM/ KIN n=768	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=757	PTT/ KEY n=85	MUK/ CLI n=757	ANA/ SJI n=201	INTER SJI n=29*
Cleanliness of the vessels	88%	90%	87%	81%	86%	79%	84%	85%	83%	85%	89%	78%
Minimal arrival time prior to departure	83%	77%	79%	85%	85%	80%	83%	85%	77%	85%	87%	90%
WSF website	63%	73%	66%	67%	71%	66%	79%	65%	90%	65%	74%	68%
Interactions with terminal personnel	61%	63%	65%	76%	75%	79%	69%	70%	74%	70%	68%	71%
Interactions with vessel personnel	57%	63%	57%	63%	62%	60%	65%	57%	60%	57%	66%	74%
On-time departures	51%	67%	52%	40%	44%	54%	51%	47%	55%	47%	39%	22%
On-board amenities and services	44%	45%	38%	26%	42%	14%	19%	28%	44%	28%	36%	23%
Telephone customer service	30%	39%	33%	34%	34%	23%	40%	34%	43%	34%	30%	47%

* Caution: Small sample sizes

Q16 We'd like to know how important some different aspects of the Washington State Ferries are to you, and how satisfied you are with these. Please rate how important each of the following items are to you. (1=Not important; 5=Very important)



Ferry Feature Satisfaction - By route

- ❖ Seattle/Bremerton has significantly higher satisfaction ratings for **minimal arrival time**.
- ❖ Overall, Port Townsend/Keystone riders are more satisfied with ferry features than riders on other routes.

Top Box 4 & 5 Ratings	SEA/ BAIN n=1084	SEA/ BREM n=458	EDM/ KIN n=768	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=757	PTT/ KEY n=85	ANA/ SJI n=201	INTER SJI n=29*
Minimal arrival time prior to departure	79%	83%	77%	71%	83%	85%	75%	74%	74%	70%	73%
On-time departures	74%	71%	63%	62%	63%	64%	66%	87%	81%	58%	64%
WSF website	68%	71%	67%	64%	65%	82%	70%	70%	78%	75%	67%
Interactions with terminal personnel	60%	56%	66%	54%	61%	65%	64%	72%	76%	65%	70%
Cleanliness of the vessels	64%	47%	68%	76%	67%	80%	80%	68%	81%	52%	57%
Interactions with vessel personnel	62%	57%	61%	49%	53%	49%	56%	59%	69%	58%	67%
On-board amenities and services	44%	40%	50%	54%	49%	58%	50%	56%	40%	24%	29%
Telephone customer service	44%	41%	45%	34%	33%	37%	44%	44%	59%	39%	44%

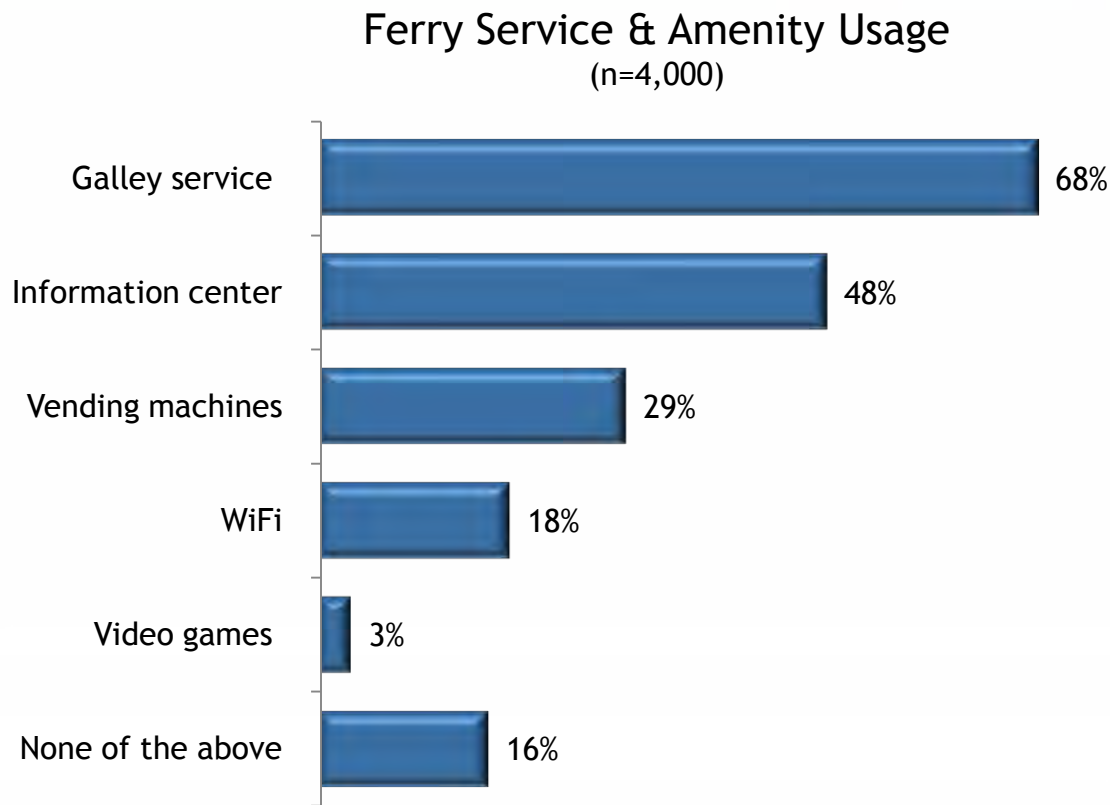
* Caution: Small sample sizes

Q16 We'd like to know how important some different aspects of the Washington State Ferries are to you, and how satisfied you are with these. Please rate how satisfied you currently are with each. (1=Dissatisfied; 5=Very satisfied)



Ferry Services & Amenities Usage

- ❖ More than two thirds (68%) of ferry riders use the **galley service** and nearly half (48%) use the **information center**.
- ❖ Roughly one fifth (16%) of ferry riders do not use any of the services or amenities offered.



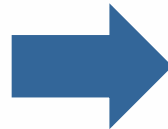
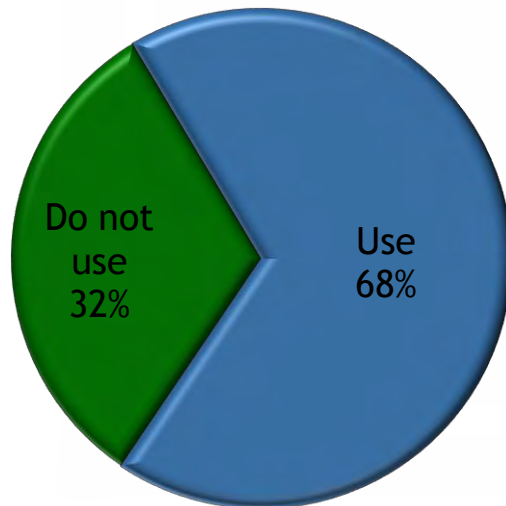
Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.



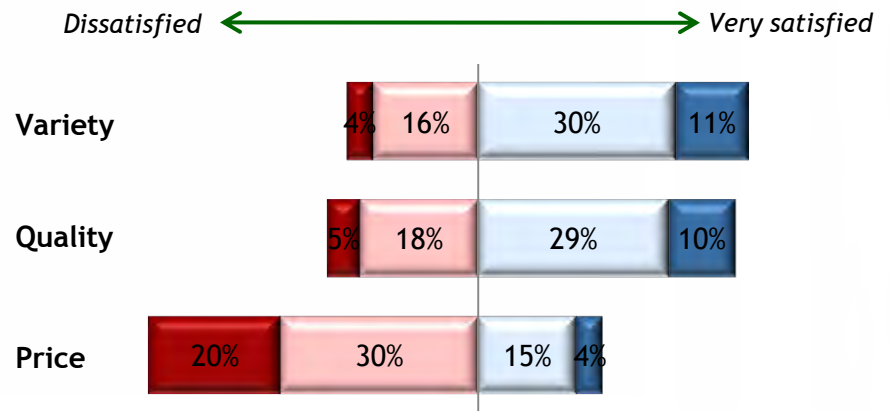
Galley Service

- ❖ The **galley service** is used by two thirds (68%) of ferry riders.
- ❖ Two fifths of galley customers are satisfied with the **variety and quality of products offered**; however, half (50%) are dissatisfied with the **high prices**.

Galley Service Usage
(n=4,000)



Galley Service Satisfaction
(n=2,699)



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown.
Ratings of 3 or don't know are not shown.

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

Q18a How satisfied are you with the following aspects of the galley?



Galley Service - By route

- ❖ Usage of the galley service is higher for the Seattle/Bainbridge, Edmonds/Kingston and Fauntleroy/Southworth routes.

Service & Amenity Usage	SEA/ BAIN n=1068	SEA/ BREM n=448	EDM/ KIN n=755	FAU/ VAS n=372	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=749	PTT/ KEY n=81	ANA/ SJI n=198	INTER SJI n=29*
Galley service	77%	69%	76%	65%	75%	57%	34%	70%	62%	13%	7%
Top Box 4 & 5 Ratings	SEA/ BAIN n=816	SEA/ BREM n=305	EDM/ KIN n=574	FAU/ VAS n=239	FAU/ SOU n=112	SOU/ VAS n=18*	PTD/ TAH n=40	MUK/ CLI n=518	PTT/ KEY n=46	ANA/ SJI n=25*	INTER SJI n=2*
Variety of products offered	40%	33%	41%	43%	42%	46%	41%	48%	42%	37%	--
Quality of the products sold	37%	30%	41%	36%	46%	46%	43%	44%	44%	18%	--
Price charged	17%	12%	16%	25%	18%	19%	33%	27%	20%	10%	--

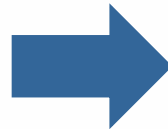
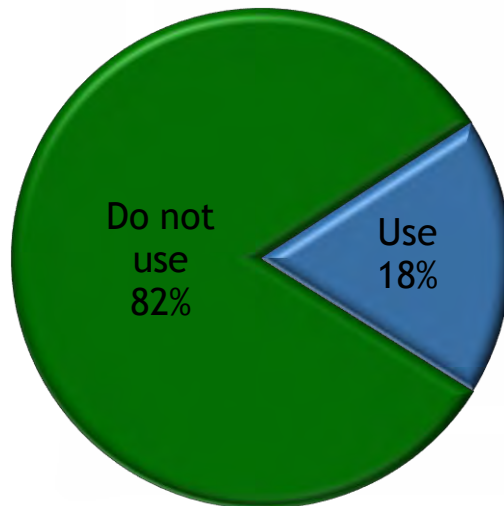
* Caution: Small sample sizes

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

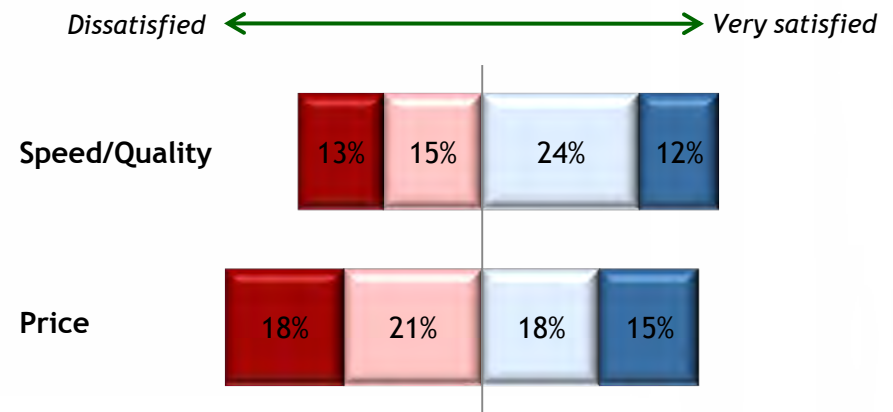
Q18a How satisfied are you with the following aspects of the galley?

- ❖ Less than one fifth (18%) of ferry riders utilize the on-board WiFi connections.
- ❖ Of those who use WiFi, one third (36%) are satisfied with the speed/quality; however, more than two fifths (39%) are dissatisfied with price charged.

WiFi Usage
(n=4,000)



WiFi Satisfaction
(n=642)



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown.
Ratings of 3 or don't know are not shown.

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

Q18b How satisfied are you with the following aspects of the on-board WiFi connection?



WiFi - By route

- ❖ Riders of the Seattle/Bainbridge and Seattle/Bremerton routes are more likely to utilize the on-board WiFi connection.

Service & Amenity Usage	SEA/ BAIN n=1068	SEA/ BREM n=448	EDM/ KIN n=755	FAU/ VAS n=372	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=749	PTT/ KEY n=81	ANA/ SJI n=198	INTER SJI n=29*
WiFi	26%	26%	16%	12%	15%	14%	9%	10%	23%	4%	--
Top Box 4 & 5 Ratings	SEA/ BAIN n=258	SEA/ BREM n=109	EDM/ KIN n=108	FAU/ VAS n=42	FAU/ SOU n=20*	SOU/ VAS n=4*	PTD/ TAH n=7*	MUK/ CLI n=61	PTT/ KEY n=10*	ANA/ SJI N=6*	INTER SJI n=0
Speed/quality of the onboard WiFi	32%	25%	48%	37%	47%	0%	51%	50%	41%	14%	--
Price charged for WiFi onboard	30%	46%	21%	34%	41%	20%	51%	41%	39%	14%	--

* Caution: Small sample sizes

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

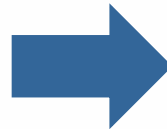
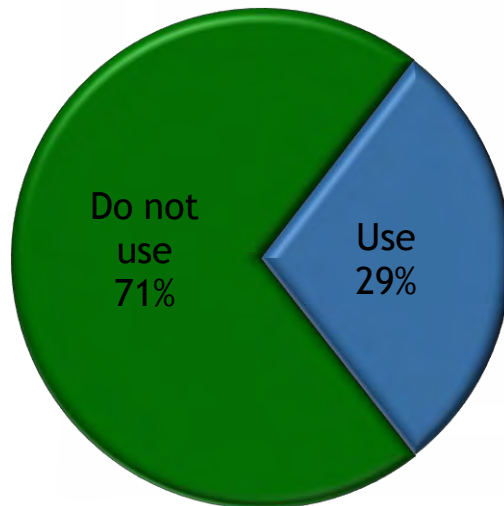
Q18b How satisfied are you with the following aspects of the on-board WiFi connection?



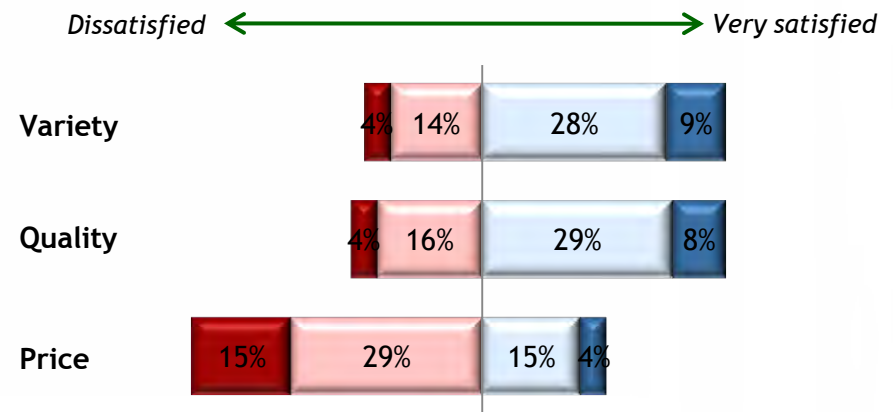
Vending Machines

- ❖ Nearly one third (29%) of ferry riders use the vending machines, with over one third satisfied with the variety and quality of products offered.
- ❖ Less than one fifth (19%) are satisfied with the prices of the vending machine products offered.

Vending Machine Usage
(n=4,000)



Vending Machine Satisfaction
(n=1,128)



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown.
Ratings of 3 or don't know are not shown.

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

Q18c How satisfied are you with the following aspects of the vending machines?



Vending Machines - By route

- ❖ Riders of the Seattle/Bremerton routes are more likely to use the vending machines.

Service & Amenity Usage	SEA/ BAIN n=1068	SEA/ BREM n=448	EDM/ KIN n=755	FAU/ VAS n=372	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=749	PTT/ KEY n=81	ANA/ SJI n=198	INTER SJI n=29*
Vending Machines	31%	38%	27%	26%	29%	28%	18%	21%	32%	43%	37%
Top Box 4 & 5 Ratings	SEA/ BAIN n=327	SEA/ BREM n=166	EDM/ KIN n=200	FAU/ VAS n=95	FAU/ SOU n=44	SOU/ VAS n=9*	PTD/ TAH n=21*	MUK/ CLI n=151	PTT/ KEY n=22*	ANA/ SJI n=84	INTER SJI n=8*
Variety of vending products offered	39%	38%	42%	31%	30%	20%	48%	41%	28%	26%	20%
Quality of vending products sold	40%	38%	37%	30%	36%	20%	48%	42%	20%	26%	39%
Price charged	24%	15%	18%	15%	17%	10%	32%	22%	20%	16%	--

* Caution: Small sample sizes

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

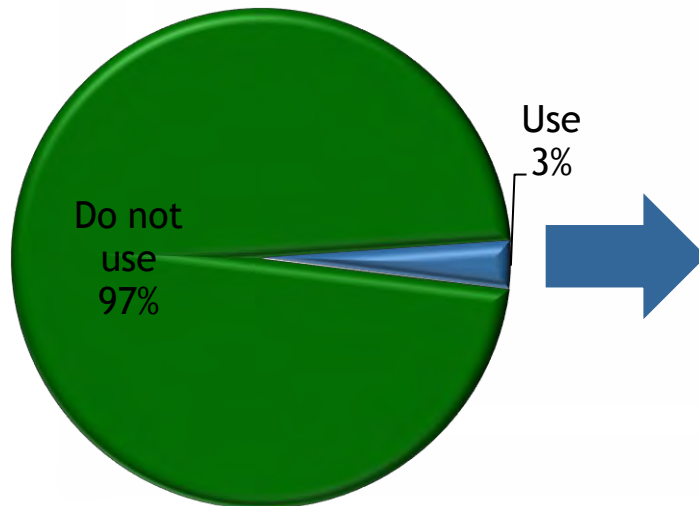
Q18c How satisfied are you with the following aspects of the vending machines?



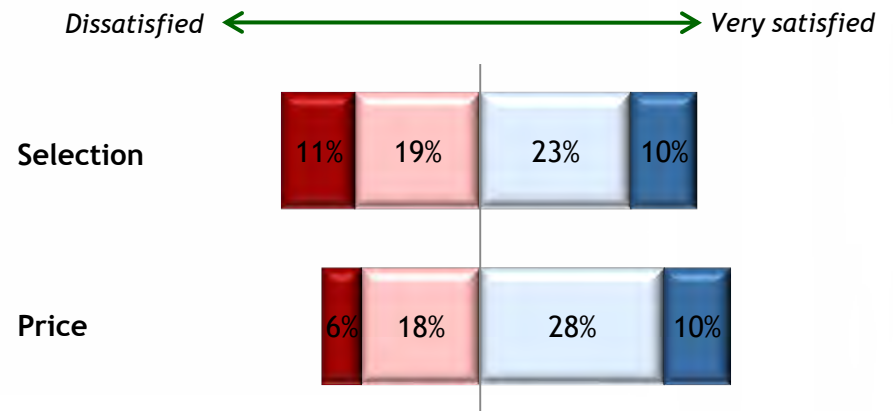
Video Games

- ❖ Only 3% of ferry riders use the video games; however, of those who play, roughly one third or more are satisfied with the selection (33%) and prices of the games (38%).

Video Game Usage
(n=4,000)



Video Game Satisfaction
(n=111)



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown.
Ratings of 3 or don't know are not shown.

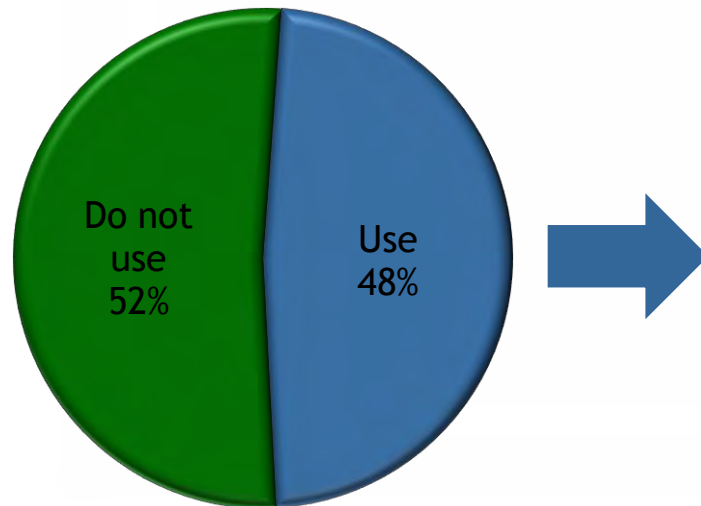
- Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.
Q18d How satisfied are you with the following aspects of the video games?



Information Center

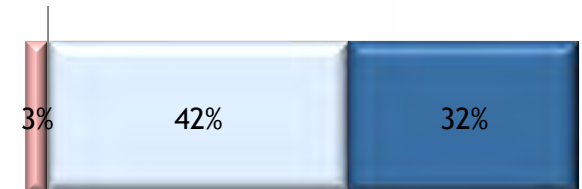
- ❖ Roughly half (48%) of ferry riders use the information center and roughly three fourths (74%) are satisfied with the information provided.

Information Center Usage
(n=4,000)



Information Center Satisfaction
(n=1,917)

Dissatisfied ← → Very satisfied



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown.
Ratings of 3 or don't know are not shown.

- Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.
Q18e How satisfied are you with the information provided in the information center?



Information Center - By route

- ❖ Use of the information center is relatively consistent across all routes.

Service & Amenity Usage	SEA/ BAIN n=1068	SEA/ BREM n=448	EDM/ KIN n=755	FAU/ VAS n=372	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=749	PTT/ KEY n=81	ANA/ SJI n=198	INTER SJI n=29*
Information Center	41%	49%	55%	46%	55%	48%	41%	52%	52%	51%	48%
Top Box 4 & 5 Ratings	SEA/ BAIN n=433	SEA/ BREM n=219	EDM/ KIN n=413	FAU/ VAS n=170	FAU/ SOU n=83	SOU/ VAS n=15*	PTD/ TAH n=48	MUK/ CLI n=388	PTT/ KEY n=42	ANA/ SJI n=102	INTER SJI n=14*
Information provided	72%	78%	77%	65%	79%	71%	69%	77%	76%	73%	37%

* Caution: Small sample sizes

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

Q18e How satisfied are you with the information provided in the information center?

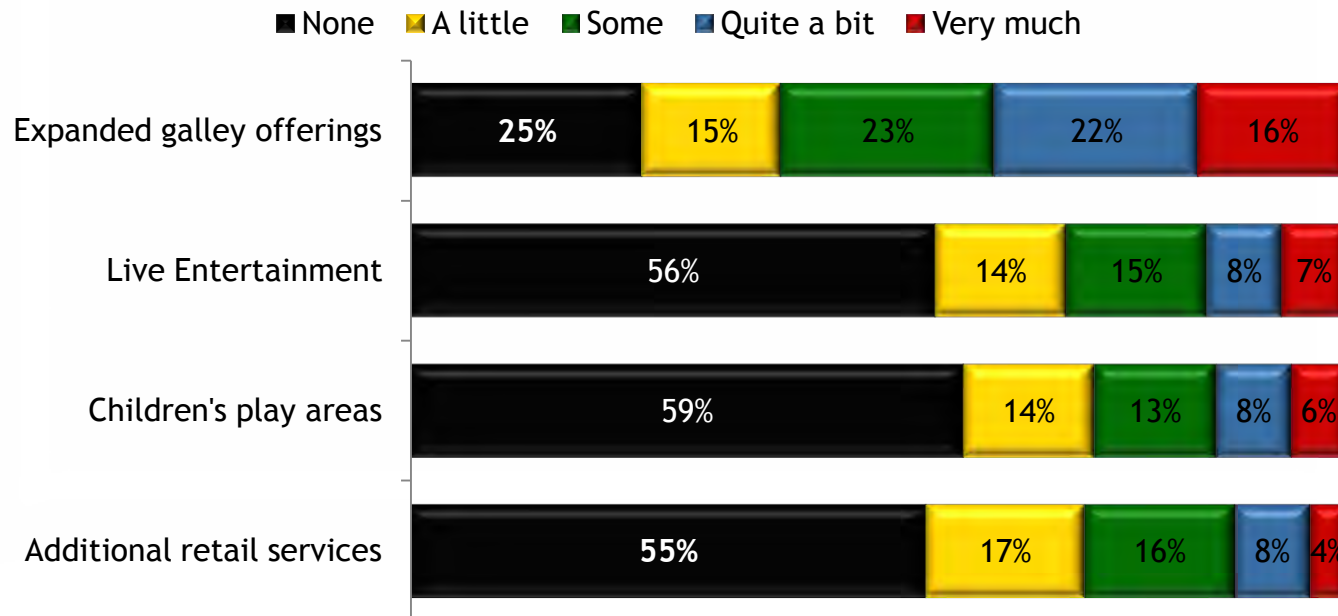


New On-Board Services & Amenities

- ❖ Interest is highest for **expanded galley offerings**.
- ❖ More than half of ferry riders have no interest in **live entertainment** (56%), a **children's play area** (59%) or **additional retail services** (55%).

Interest in New On-Board Services & Amenities

(n=3,942)



Q19 How interested would you be in each of the following possible new on-board services or amenities?



New On-Board Services & Amenities - By route

- ❖ Riders on the Seattle/Bainbridge and Seattle/Bremerton routes have the highest interest in for **expanded galley offerings**, **live entertainment** and a **children's play area**.
- ❖ Riders on the San Juan Island routes also show high interest for **expanded galley offerings** and a higher than average interest in a **children's play area**.

Top Box 4 & 5 Ratings	SEA/ BAIN n=1047	SEA/ BREM n=443	EDM/ KIN n=752	FAU/ VAS n=364	FAU/ SOU n=149	SOU/ VAS n=27*	PTD/ TAH n=115	MUK/ CLI n=736	PTT/ KEY n=83	ANA/ SJI n=196	INTER SJI n=29*
Expanded galley offerings	45%	45%	37%	31%	34%	17%	13%	29%	37%	49%	42%
Live Entertainment	18%	18%	15%	11%	10%	6%	6%	14%	14%	12%	22%
Children's play areas	18%	18%	13%	10%	13%	9%	8%	8%	6%	20%	16%
Additional retail services	16%	16%	15%	9%	12%	3%	7%	8%	7%	9%	11%

* Caution: Small sample sizes

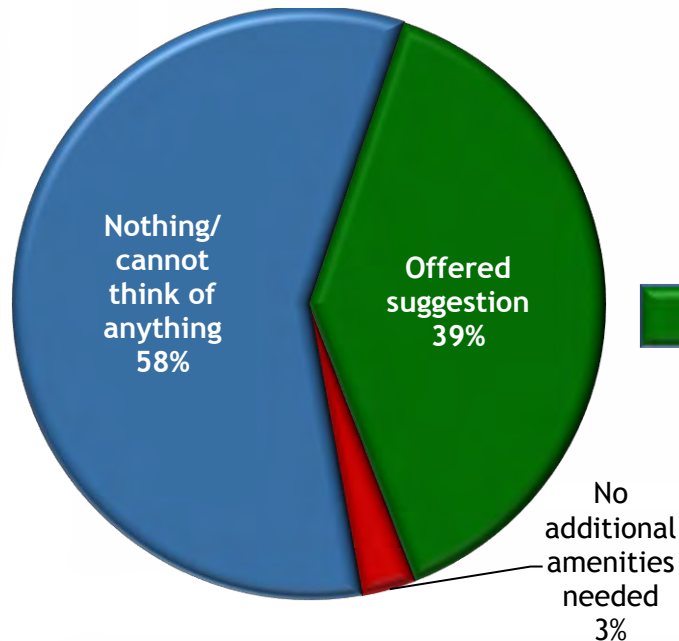
Q19 How interested would you be in each of the following possible new on-board services or amenities?



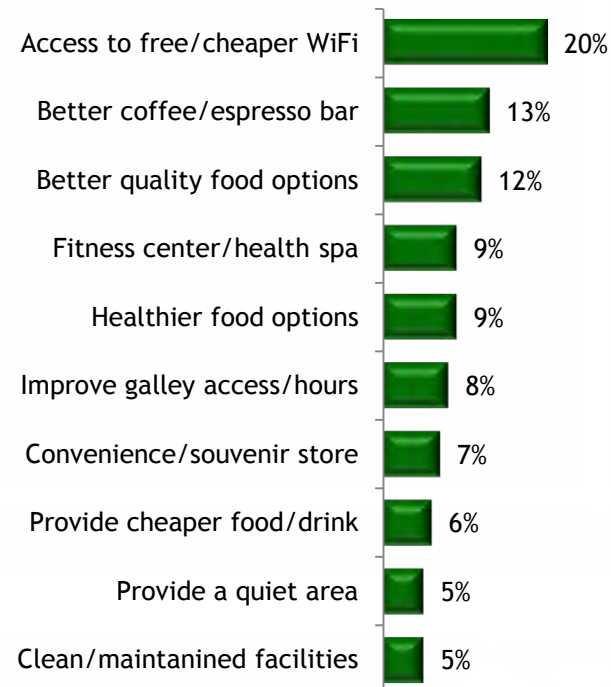
Other On-Board Services & Amenities

- ❖ Three in five (58%) ferry riders stated that there are **no additional on-board services or amenities** they would like to see offered on the ferry.
- ❖ Of these who did offer suggestions, the main services they would like to see are **free or cheaper WiFi** (20%) and **better coffee and food options** (13% and 12%, respectively).
 - No statistical difference by route or mode.

Additional Services & Amenities (n=4,152)



Top Suggested Services & Amenities (n=1,637)



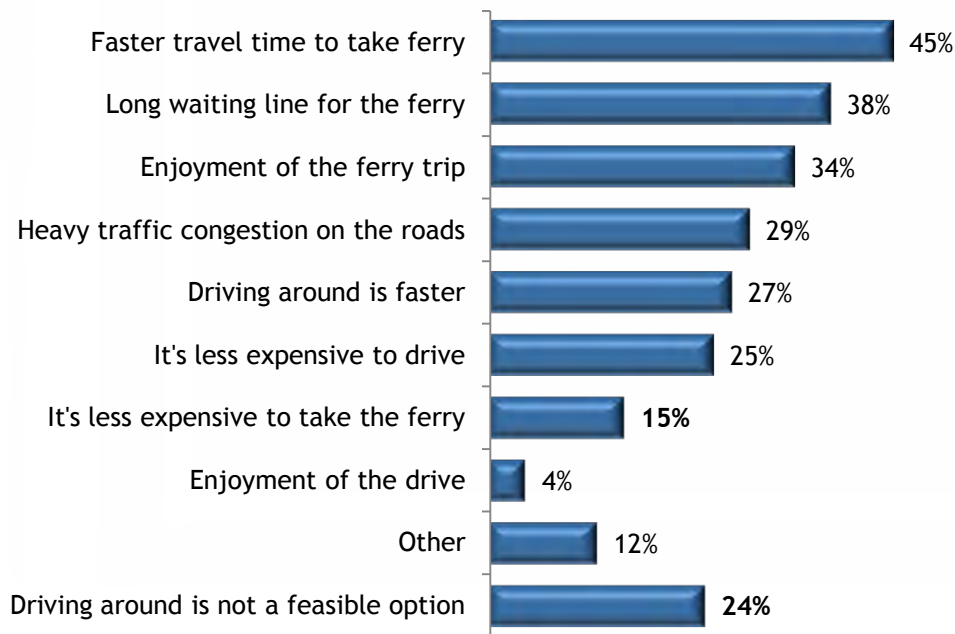
Q20 What, if any, services or amenities would you likely use if it was offered on your ferry?



Factors Determining Ferry Travel

- ❖ **Faster travel time to take the ferry** is the main factor in deciding whether to take the ferry or drive around (45%).
 - Recreational riders are more likely to state enjoyment of the ferry trip.
- ❖ The primary deterrent to taking the ferry is the **long lines waiting to catch the ferry** (38%).

Factors Determining Ferry Travel
(n=4,090)



Most
Important
Factor

22%

16%

9%

6%

7%

7%

3%

0%

7%

24%

- Q21 When considering whether to drive around or take the ferry (for routes where it is feasible to drive around), which of these are key factors in your decision?
- Q22 Which is the most important factor?



Factors Determining Ferry Travel - By route

- ❖ Non-Island route residents appear to trade off traffic congestion on the roads (saving time) versus long waits at ferry terminal.

Factors Determining Ferry Travel	SEA/ BAIN n=1096	SEA/ BREM n=461	EDM/ KIN n=775	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=117	MUK/ CLI n=765	PTT/ KEY n=85	ANA/ SJI n=202	INTER SJI n=28*
Faster travel time to take ferry	55%	40%	51%	16%	38%	42%	16%	57%	46%	16%	10%
Long waiting line for the ferry	40%	30%	50%	15%	55%	37%	11%	49%	33%	12%	9%
Enjoyment of the ferry trip	38%	51%	40%	12%	52%	39%	10%	29%	49%	13%	13%
Heavy traffic congestion on the roads	33%	55%	32%	11%	54%	41%	9%	18%	31%	10%	9%
Driving around is faster	29%	41%	36%	8%	52%	34%	10%	18%	22%	7%	20%
It's less expensive to drive	31%	39%	34%	5%	36%	35%	5%	14%	13%	9%	4%
It's less expensive to take the ferry	15%	24%	14%	6%	20%	24%	2%	21%	19%	7%	0%
Enjoyment of the drive	2%	4%	5%	3%	3%	3%	4%	5%	5%	3%	0%
Other	14%	24%	13%	2%	24%	11%	3%	7%	14%	2%	0%
Driving around is not a feasible option	14%	9%	12%	75%	2%	25%	73%	19%	14%	73%	78%

* Caution: Small sample sizes

Q21 When considering whether to drive around or take the ferry (for routes where it is feasible to drive around), which of these are key factors in your decision?



Key Factor Determining Ferry Travel - By route

- ❖ **Faster travel time on the ferry** is the most important factor determining ferry travel for the Seattle/Bainbridge and Mukilteo/Clinton routes.

Factors Determining Ferry Travel	SEA/ BAIN n=1097	SEA/ BREM n=462	EDM/ KIN n=777	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=767	PTT/ KEY n=85	ANA/ SJI n=202	INTER SJI n=29*
Faster travel time to take ferry	29%	11%	23%	7%	12%	18%	8%	34%	22%	9%	1%
Long waiting line for the ferry	13%	5%	23%	6%	19%	6%	6%	29%	13%	6%	7%
Enjoyment of the ferry trip	10%	14%	11%	4%	11%	6%	2%	4%	22%	5%	1%
Heavy traffic congestion on the roads	6%	15%	5%	3%	16%	11%	1%	2%	10%	1%	1%
Driving around is faster	8%	12%	8%	1%	17%	18%	3%	3%	4%	1%	10%
It's less expensive to drive	8%	13%	10%	0%	8%	7%	3%	3%	1%	2%	0%
It's less expensive to take the ferry	3%	9%	1%	2%	4%	0%	1%	3%	5%	1%	0%
Other	8%	12%	7%	2%	12%	9%	4%	4%	8%	2%	3%
Driving around is not a feasible option	13%	9%	12%	75%	2%	25%	72%	18%	14%	73%	76%

* Caution: Small sample sizes

Q22 Which is the most important factor?

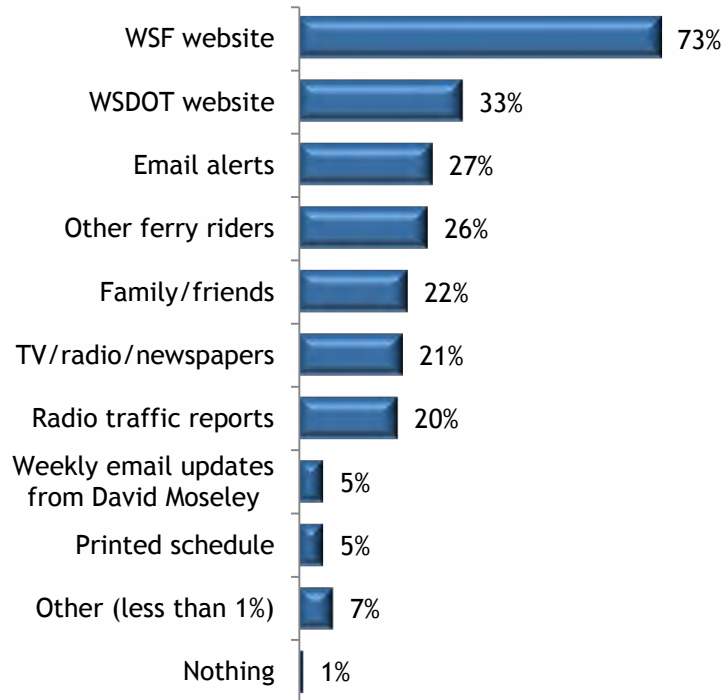


WSF Information

- ❖ Three quarters (73%) of ferry riders receive their information about the Washington State Ferries via the **WSF website**.
- ❖ Over one third (37%) would use **highway advisory radio** for WSF information, if made available.

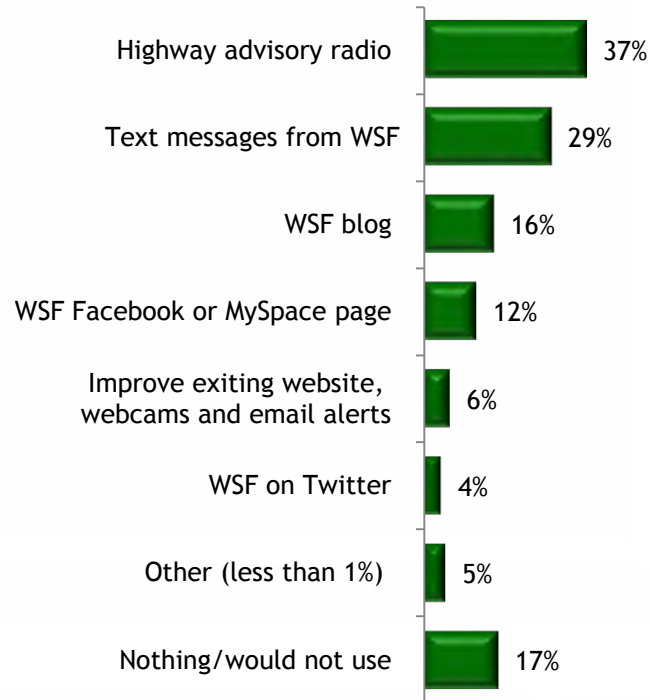
Current Sources of WSF Information

(n=4,160)



Suggested Sources of WSF Information

(n=4,088)



Q23 Which of the following do you use to obtain information about Washington State Ferries?

Q24 Which of the following, if it were available, would you obtain to find information about Washington State Ferries?



Current WSF Information - By route

- ❖ Riders of the Fauntleroy/Vashon route are more likely than other route riders to use email alerts, other ferry friends and family and friends to obtain information about the Washington State Ferries.

Current Sources of WSF Information	SEA/ BAIN n=1117	SEA/ BREM n=473	EDM/ KIN n=794	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=208	INTER SJI n=29*
WSF website	73%	71%	73%	69%	71%	76%	80%	73%	85%	77%	77%
WSDOT website	31%	30%	39%	26%	36%	31%	24%	36%	46%	31%	21%
Email alerts	26%	36%	18%	43%	34%	40%	39%	22%	30%	25%	32%
Other ferry riders	27%	29%	18%	35%	24%	35%	33%	26%	15%	27%	51%
Family/friends	22%	19%	16%	31%	15%	32%	28%	22%	19%	29%	35%
TV/radio/newspapers	19%	25%	23%	21%	21%	8%	27%	21%	15%	15%	4%
Radio traffic reports	19%	14%	25%	21%	22%	24%	23%	23%	16%	10%	5%
Weekly email updates from David Moseley	3%	4%	6%	9%	7%	7%	8%	4%	7%	8%	0%
Printed schedule	6%	5%	4%	5%	6%	0%	2%	2%	5%	6%	4%
Other	6%	4%	8%	8%	5%	10%	7%	7%	4%	10%	15%
Nothing	1%	1%	0%	0%	1%	0%	3%	1%	0%	0%	0%

* Caution: Small sample sizes

Q23 Which of the following do you use to obtain information about Washington State Ferries?



Future WSF Information - By route

- ❖ In addition to the strong support of the use of highway advisory radio, text messages from the WSF and a WSF blog would also be utilized by a large number of riders.

Suggested Sources of WSF Information	SEA/ BAIN n=1102	SEA/ BREM n=465	EDM/ KIN n=780	FAU/ VAS n=367	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=117	MUK/ CLI n=761	PTT/ KEY n=85	ANA/ SJI n=201	INTER SJI n=28*
Highway advisory radio	31%	24%	51%	33%	39%	34%	38%	44%	42%	35%	26%
Text messages from WSF	31%	36%	26%	34%	31%	23%	26%	23%	32%	23%	14%
WSF blog	17%	17%	12%	18%	20%	33%	10%	14%	11%	22%	20%
WSF Facebook or MySpace page	12%	18%	12%	8%	11%	8%	5%	10%	13%	10%	8%
Improve exiting website, webcams and email alerts	6%	5%	6%	5%	4%	0%	7%	6%	6%	8%	4%
WSF on Twitter	6%	5%	3%	7%	2%	3%	0%	2%	1%	3%	0%
Other (less than 1%)	4%	5%	5%	4%	6%	0%	9%	4%	6%	8%	15%
Nothing/would not use	18%	18%	12%	18%	13%	15%	28%	18%	14%	17%	33%

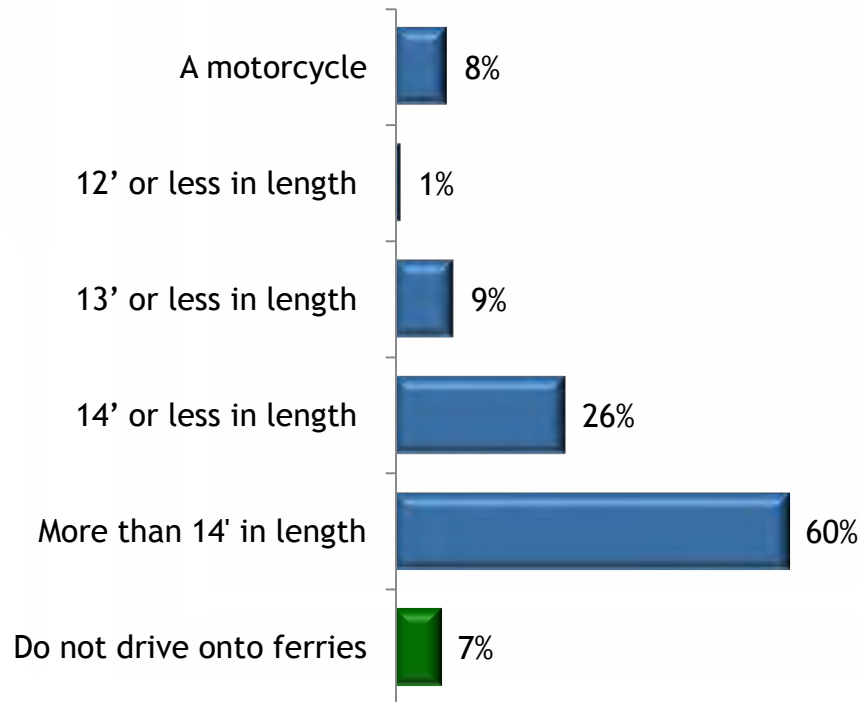
* Caution: Small sample sizes

Q24 Which of the following, if it were available, would you obtain to find information about Washington State Ferries?



Vehicle Size

Current Vehicle Size
(n=4,058)



- ❖ Three fifths (60%) of riders who drive onto the ferries, drive a vehicle **more than 14' in length**.
- ❖ Seattle/Bainbridge, Seattle/Bremerton and Southworth/Vashon riders are less likely to drive onto the ferries.
- ❖ More than four fifths (83%) do **not plan on buying a vehicle in the next twelve months**.

Q25 If you drive on to any ferry, do you currently use a vehicle that is...

Q26 In the next 12 months, do you plan to purchase a vehicle that is...



Vehicle Size - By route

Current Vehicle Size	SEA/ BAIN n=1084	SEA/ BREM n=458	EDM/ KIN n=768	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=757	PTT/ KEY n=85	ANA/ SJI n=201	INTER SJI n=29*
A motorcycle	7%	5%	9%	7%	12%	3%	7%	9%	4%	4%	4%
12' or less in length	1%	2%	1%	1%	2%	0%	0%	2%	3%	1%	0%
13' or less in length	8%	9%	9%	10%	10%	3%	12%	8%	18%	8%	5%
14' or less in length	25%	24%	26%	31%	21%	17%	25%	25%	30%	23%	41%
More than 14' in length	59%	45%	63%	59%	61%	63%	63%	68%	48%	70%	55%
Do not drive onto ferries	9%	23%	3%	2%	7%	17%	5%	2%	4%	3%	0%

New Vehicle Size	SEA/ BAIN n=981	SEA/ BREM n=355	EDM/ KIN n=742	FAU/ VAS n=369	FAU/ SOU n=140	SOU/ VAS n=26*	PTD/ TAH n=113	MUK/ CLI n=739	PTT/ KEY n=82	ANA/ SJI n=194	INTER SJI n=29*
A motorcycle	2%	3%	2%	2%	4%	0%	1%	1%	0%	1%	0%
12' or less in length	1%	0%	0%	3%	1%	0%	0%	0%	1%	0%	0%
13' or less in length	3%	4%	3%	3%	4%	0%	1%	2%	4%	2%	0%
14' or less in length	5%	6%	5%	5%	5%	0%	4%	4%	5%	3%	7%
More than 14' in length	7%	7%	11%	6%	11%	22%	11%	8%	4%	11%	8%
Don't plan on buying a vehicle in the next 12 months	84%	80%	81%	82%	78%	78%	84%	86%	86%	84%	84%

Q25 If you drive on to any ferry, do you currently use a vehicle that is...

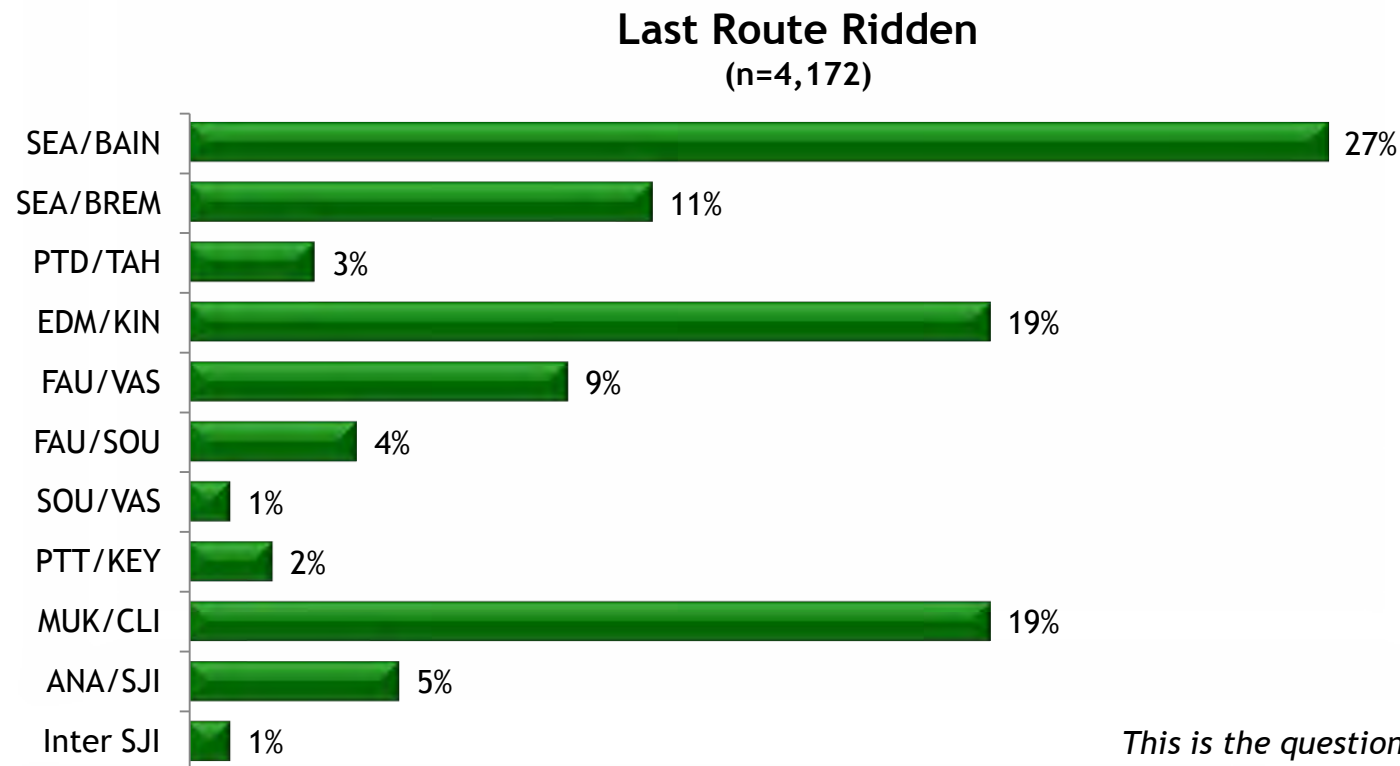
Q26 In the next 12 months, do you plan to purchase a vehicle that is...

* Caution: Small sample sizes



Last Ferry Ride - By route

- ❖ Seattle/Bainbridge is the route ridden last by one quarter (27%) of the ferry riders, followed by Edmonds/Kingston and Mukilteo/Clinton (both 19%).



This is the question used for weighting the data.

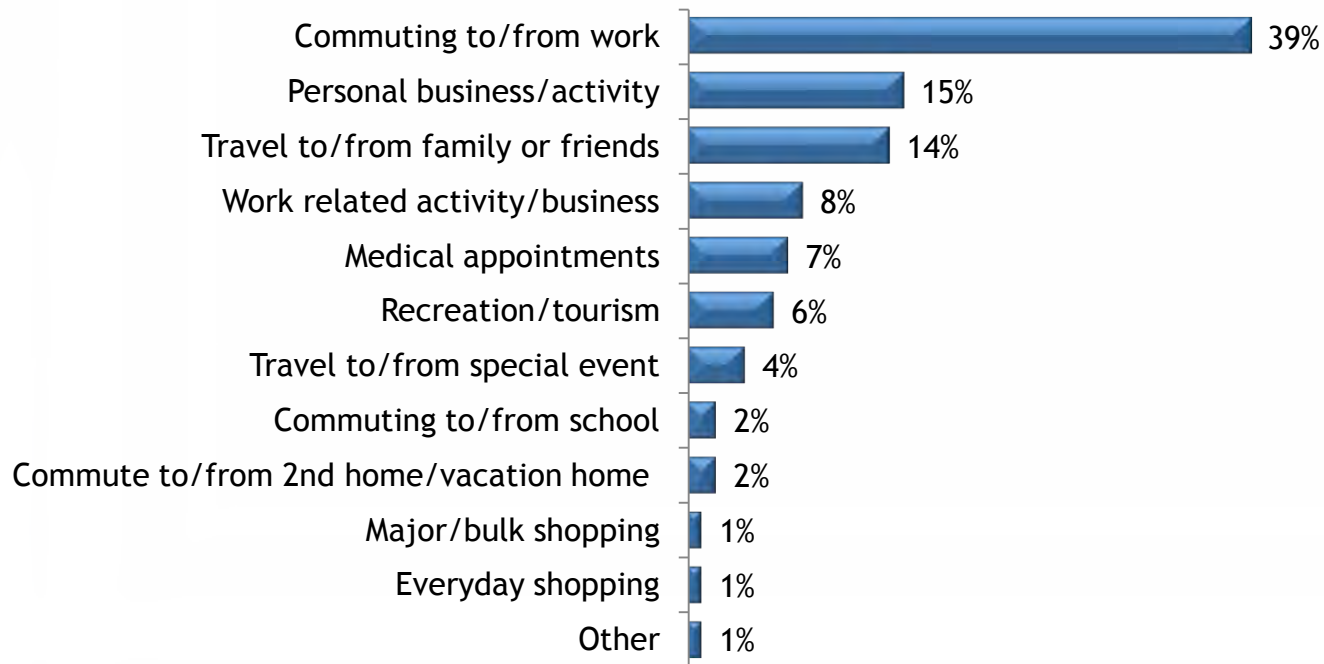
Q27 What was the last route that you rode?



Purpose of Last Ferry Ride

- ❖ Two fifths (39%) of riders used the ferry last to **commute to and from work**.
- ❖ The percentage of trips for recreation/tourism has decreased significantly since winter wave 2008, whereas the number of trips for commuting to and from work has increased.

Purpose of Last Ferry Ride
(n=4,172)



2008 Trip Purpose
34%
16%
17%
8%
4%
11%
4%
1%
n/a
1%
1%
3%

Q28 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?



Purpose of Last Ferry Ride - By route

- ❖ Seattle/Bremerton, Fauntleroy/Southworth and Southworth/Vashon routes are used primarily for commuting to and from work.

Purpose of Last Ferry Ride 2010	SEA/ BAIN n=1120	SEA/ BREM n=476	EDM/ KIN n=795	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=775	PTT/ KEY n=85	ANA/ SJI n=209	INTER SJI n=29*
Commuting to/from work	44%	53%	34%	44%	57%	68%	44%	33%	17%	13%	25%
Personal business/activity	15%	12%	16%	16%	9%	0%	14%	16%	11%	23%	13%
Travel to/from family or friends	11%	12%	19%	12%	18%	0%	14%	13%	27%	16%	0%
Work related activity/business	7%	5%	9%	10%	5%	3%	5%	8%	5%	9%	29%
Medical appointments	6%	3%	6%	6%	5%	3%	4%	12%	2%	16%	14%
Recreation/tourism	6%	6%	8%	2%	4%	14%	2%	4%	16%	7%	3%
Travel to/from special event	6%	4%	3%	3%	0%	6%	2%	3%	13%	3%	11%
Commuting to/from school	2%	3%	1%	1%	0%	0%	3%	2%	1%	0%	3%
Commute to/from 2 nd home/vacation home	0%	0%	1%	1%	0%	0%	3%	3%	3%	5%	0%
Major/bulk shopping	1%	0%	1%	2%	1%	3%	2%	2%	4%	4%	0%
Everyday shopping	0%	1%	0%	1%	0%	0%	7%	1%	0%	2%	0%
Other	2%	0%	1%	1%	1%	4%	1%	2%	0%	1%	0%

* Caution: Small sample sizes

Q28 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?



Purpose of Last Ferry Ride - By route 2008

- ❖ The primary purposes for travel on the Anacortes/San Juan Island route is **recreation and tourism and travel to and from family and friends.**

Purpose of Last Ferry Ride 2008	SEA/ BAIN n=1485	SEA/ BREM n=592	EDM/ KIN n=1010	FAU/ VAS n=485	FAU/SOU/VAS n=204	PTD/ TAH n=147	MUK/ CLI n=934	PTT/ KEY n=127	ANA/ SJI n=340
Commuting to/from work	40%	48%	28%	46%	41%	46%	27%	14%	4%
Personal business/activity	14%	13%	15%	15%	13%	11%	22%	12%	17%
Travel to/from family or friends	12%	11%	29%	6%	20%	9%	23%	27%	21%
Work related activity/business	7%	9%	10%	8%	11%	9%	5%	18%	5%
Medical appointments	5%	2%	2%	5%	2%	6%	5%	4%	8%
Recreation/tourism	11%	8%	11%	4%	5%	8%	7%	21%	33%
Travel to/from special event	5%	4%	2%	6%	3%	3%	3%	1%	1%
Commuting to/from school	1%	3%	1%	3%	2%	4%	1%	0%	1%
Commute to/from 2 nd home/vacation home	--	--	--	--	--	--	--	--	--
Major/bulk shopping	1%	1%	1%	1%	0%	3%	2%	0%	5%
Everyday shopping	1%	<1%	1%	1%	0%	1%	1%	0%	1%
Other	3%	2%	1%	4%	2%	0%	5%	3%	4%

* Caution: Small sample sizes

Q28 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?

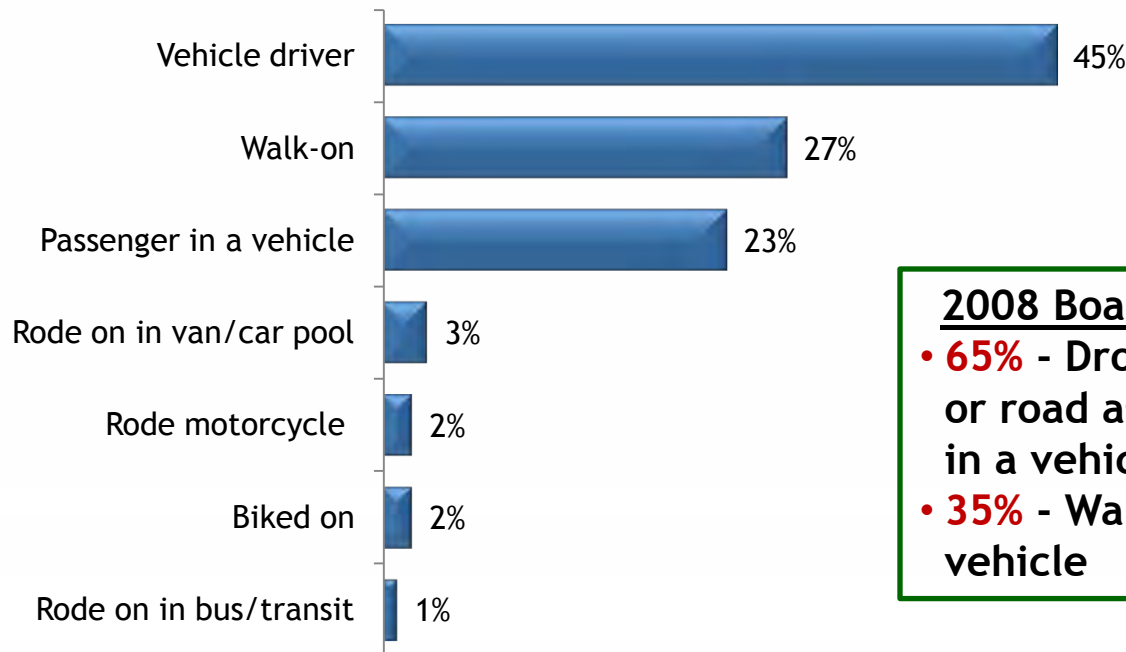


Boarding Method of Last Ferry Ride

- ❖ Two thirds of ferry riders boarded the ferry as either a **driver or passenger in a vehicle** and more than one quarter **walked-on**.
- ❖ The percentage of walk-on passengers has decreased significantly since winter wave 2008, while drive on ridership has increased.

Boarding Method of Last Ferry Ride

(n=4,171)



2008 Boarding Method

- **65%** - Drove a vehicle or road as a passenger in a vehicle
- **35%** - Walked onto the vehicle

Q29 Thinking about your **LAST FERRY RIDE ONLY**, were you the vehicle driver, a passenger in a vehicle or did you walk onto the ferry?



Boarding Method of Last Ferry Ride - By route

- ❖ Seattle/Bainbridge, Seattle/Bremerton and Southworth/Vashon have a higher proportion of walk-on riders than other routes.

Boarding Method of Last Ferry Ride 2010	SEA/ BAIN n=1120	SEA/ BREM n=476	EDM/ KIN n=795	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=210	INTER SJI n=29*
Vehicle driver	32%	23%	54%	57%	57%	59%	61%	54%	49%	56%	55%
Walk-on	42%	61%	13%	14%	17%	39%	10%	14%	16%	9%	14%
Passenger in a vehicle	20%	11%	27%	23%	16%	3%	25%	28%	37%	36%	28%
Rode on in van/car pool	2%	1%	6%	3%	8%	0%	0%	4%	0%	0%	7%
Rode motorcycle	2%	2%	2%	3%	7%	3%	1%	2%	1%	0%	0%
Biked on	5%	4%	1%	1%	1%	0%	3%	1%	2%	1%	0%
Rode on in bus/transit	0%	2%	1%	3%	0%	0%	2%	1%	0%	0%	0%

Boarding Method of Last Ferry Ride 2008	SEA/ BAIN n=1511	SEA/ BREM n=612	EDM/ KIN n=1046	FAU/ VAS n=495	FAU/SOU/VAS n=207	PTD/ TAH n=152	MUK/ CLI n=973	PTT/ KEY n=129	ANA/ SJ6 n=340
Vehicle driver/passenger	53%	36%	75%	67%	67%	85%	80%	81%	79%
Walk-on	47%	64%	25%	33%	33%	15%	20%	19%	21%

* Caution:
Small
sample
sizes

Q29 Thinking about your LAST FERRY RIDE ONLY, were you the vehicle driver, a passenger in a vehicle or did you walk onto the ferry??



Demographics



Years Riding

❖ Seven in ten (71%) ferry riders have been riding the ferries for more than ten years.

2010	TOTAL n=4171	SEA/ BAIN n=1120	SEA/ BREM n=476	EDM/ KIN n=795	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=210	INTER SJI n=29*
Less than one year	3%	3%	6%	2%	1%	2%	0%	4%	1%	5%	3%	0%
1 year, but less than 3 years	5%	6%	9%	5%	2%	3%	7%	4%	5%	3%	5%	0%
3 years, but less than 6 years	9%	10%	14%	7%	10%	9%	6%	9%	9%	3%	6%	4%
6 years, but less than 10 years	12%	14%	11%	11%	11%	19%	17%	12%	11%	9%	8%	1%
More than 10 years	71%	67%	59%	75%	76%	66%	70%	71%	73%	80%	79%	95%

2008	TOTAL n=5197	SEA/ BAIN n=1437	SEA/ BREM n=587	EDM/ KIN n=991	FAU/ VAS n=469	FAU/SOU/VAS n=197	PTD/ TAH n=149	MUK/ CLI n=942	PTT/ KEY n=117	ANA/ SJI n=309
Less than one year	6%	6%	12%	5%	4%	10%	2%	3%	10%	7%
1 year, but less than 3 years	6%	7%	11%	5%	6%	6%	1%	6%	8%	4%
3 years, but less than 6 years	12%	13%	13%	10%	14%	12%	13%	14%	11%	8%
6 years, but less than 10 years	15%	15%	21%	14%	17%	13%	11%	14%	12%	8%
More than 10 years	60%	59%	43%	66%	58%	59%	73%	64%	59%	72%

P3 How many years have you been riding the ferries?

* Caution: Small sample sizes



Ridership Frequency

- ❖ Roughly half (49%) of riders have increased their ferry riding frequency since they first started riding the ferries.

2010	TOTAL n=4170	SEA/ BAIN n=1120	SEA/ BREM n=475	EDM/ KIN n=795	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=210	INTER SJI n=29*
Increased significantly	28%	23%	27%	28%	26%	22%	35%	23%	33%	43%	31%	35%
Increased somewhat	21%	19%	17%	23%	22%	24%	15%	21%	21%	24%	31%	40%
No change at all	29%	31%	37%	29%	23%	36%	41%	24%	25%	15%	18%	16%
Decreased somewhat	14%	16%	12%	12%	19%	13%	3%	20%	14%	15%	14%	8%
Decreased significantly	8%	11%	6%	8%	9%	3%	6%	12%	7%	3%	6%	0%

2008	TOTAL n=5146	SEA/ BAIN n=1423	SEA/ BREM n=580	EDM/ KIN n=978	FAU/ VAS n=463	FAU/SOU/VAS n=194	PTD/ TAH n=149	MUK/ CLI n=941	PTT/ KEY n=120	ANA/ SJI n=299
Increased significantly	17%	14%	16%	19%	20%	24%	14%	20%	21%	18%
Increased somewhat	22%	19%	20%	22%	25%	26%	21%	22%	25%	27%
No change at all	36%	42%	45%	34%	30%	34%	38%	33%	30%	27%
Decreased somewhat	16%	17%	12%	16%	20%	11%	18%	17%	13%	17%
Decreased significantly	8%	8%	8%	9%	45%	5%	9%	9%	11%	11%

P4 Since you started riding the ferries, has the frequency with which you ride...?

* Caution: Small sample sizes



Rider Satisfaction

❖ Roughly three fourths (72%) of ferry riders are satisfied with the Washington State Ferries.

2010	TOTAL n=4170	SEA/ BAIN n=1120	SEA/ BREM n=475	EDM/ KIN n=795	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=210	INTER SJI n=29*
Satisfied	72%	78%	64%	74%	60%	68%	62%	66%	77%	83%	57%	60%
Extremely satisfied	25%	29%	19%	30%	15%	19%	11%	12%	32%	23%	10%	8%
Somewhat satisfied	47%	49%	45%	44%	45%	49%	51%	54%	45%	60%	47%	52%
Neither	11%	9%	12%	9%	18%	10%	15%	15%	12%	4%	14%	6%
Somewhat dissatisfied	14%	11%	19%	16%	20%	16%	23%	15%	9%	11%	23%	17%
Extremely dissatisfied	3%	3%	5%	2%	2%	5%	0%	3%	2%	3%	6%	17%
Dissatisfied	17%	14%	24%	18%	22%	21%	23%	18%	11%	14%	29%	34%

2008	TOTAL n=4952	SEA/ BAIN n=1394	SEA/ BREM n=575	EDM/ KIN n=921	FAU/ VAS n=447	FAU/SOU/VAS n=180	PTD/ TAH n=146	MUK/ CLI n=884	PTT/ KEY n=111	ANA/ SJI n=293
Satisfied	64%	72%	56%	68%	39%	62%	37%	70%	63%	69%
Extremely satisfied	20%	23%	14%	23%	9%	13%	9%	23%	21%	22%
Somewhat satisfied	44%	49%	42%	45%	30%	49%	28%	47%	42%	47%
Neither	12%	9%	12%	14%	16%	13%	12%	11%	15%	13%
Somewhat dissatisfied	17%	15%	22%	14%	30%	19%	34%	14%	16%	13%
Extremely dissatisfied	6%	4%	10%	4%	14%	6%	17%	4%	6%	5%
Dissatisfied	23%	19%	32%	18%	44%	25%	51%	18%	22%	18%

P5 Overall, how satisfied are you with Washington State Ferries?

* Caution: Small sample sizes



Ferry Value

- ❖ Over half (53%) of ferry riders feel that the Washington State Ferries provide a good value for the amount of money they pay.

2010	TOTAL n=4159	SEA/ BAIN n=1118	SEA/ BREM n=474	EDM/ KIN n=791	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=775	PTT/ KEY n=85	ANA/ SJI n=209	INTER SJI n=29*
Good value	53%	58%	57%	53%	38%	56%	31%	30%	56%	68%	43%	47%
A very good value	14%	17%	14%	14%	9%	14%	11%	8%	15%	20%	11%	8%
A good value	39%	41%	43%	39%	29%	42%	20%	22%	41%	48%	32%	39%
Neither	34%	30%	31%	32%	42%	32%	52%	49%	35%	29%	43%	24%
A poor value	11%	10%	10%	12%	17%	10%	17%	20%	8%	3%	11%	22%
A very poor value	2%	2%	2%	3%	3%	3%	0%	2%	2%	1%	3%	7%
Poor value	13%	12%	12%	15%	20%	13%	17%	22%	10%	4%	14%	29%

2008	TOTAL n=4938	SEA/ BAIN n=1390	SEA/ BREM n=573	EDM/ KIN n=919	FAU/ VAS n=439	FAU/SOU/VAS n=179	PTD/ TAH n=146	MUK/ CLI n=888	PTT/ KEY n=111	ANA/ SJI n=293
Good value	52%	56%	50%	51%	28%	54%	39%	60%	70%	56%
A very good value	13%	14%	13%	14%	2%	11%	6%	19%	21%	14%
A good value	39%	42%	37%	37%	26%	43%	33%	41%	49%	42%
Neither	31%	31%	30%	33%	33%	33%	29%	28%	22%	32%
A poor value	14%	12%	14%	13%	30%	11%	18%	10%	6%	10%
A very poor value	3%	2%	6%	2%	9%	2%	15%	2%	2%	1%
Poor value	17%	14%	20%	15%	39%	13%	33%	12%	8%	11%

P6 Which of the following phrases best describes the value, to you, of riding Washington State Ferries?
 "Value" means what you receive for the amount you pay. Are Washington State Ferries...?

* Caution: Small sample sizes



People vs. Vehicle Mover

- ❖ Nearly half (47%) of ferry riders believe that the WSF should focus its improvement on becoming **both** a people-mover and a vehicle-mover system.

2010	TOTAL n=4168	SEA/ BAIN n=1120	SEA/ BREM n=475	EDM/ KIN n=793	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=210	INTER SJI n=29*
People-mover system	27%	19%	18%	26%	32%	31%	15%	26%	39%	35%	37%	29%
Both equally	47%	51%	39%	52%	41%	42%	41%	54%	44%	42%	45%	55%
Vehicle-mover system	26%	30%	43%	21%	27%	27%	44%	19%	18%	23%	18%	15%

2008	TOTAL n=5208	SEA/ BAIN n=1449	SEA/ BREM n=584	EDM/ KIN n=984	FAU/ VAS n=469	FAU/SOU/VAS n=199	PTD/ TAH n=147	MUK/ CLI n=946	PTT/ KEY n=119	ANA/ SJI n=310
People-mover system	27%	38%	39%	18%	37%	25%	20%	14%	13%	11%
Both equally	51%	50%	49%	52%	45%	51%	53%	53%	57%	54%
Vehicle-mover system	22%	12%	12%	30%	18%	24%	27%	33%	30%	35%

* Caution: Small sample sizes

P7 Washington State Ferries is currently both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a People-Mover (vehicles are secondary) or a Vehicle-Mover (people are secondary) system?



Demographics - Distance From Ferry

2010	TOTAL n=4168	SEA/ BAIN n=1121	SEA/ BREM n=475	EDM/ KIN n=793	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=21/	INTER SJI n=29*
Less than 1 mile	1%	1%	0%	0%	3%	0%	0%	0%	0%	0%	1%	0%
1-5 miles	38%	53%	51%	30%	31%	44%	31%	33%	22%	21%	35%	35%
6-10 miles	27%	21%	23%	22%	40%	36%	51%	42%	31%	12%	27%	41%
11-15 miles	13%	10%	10%	11%	22%	10%	13%	15%	20%	13%	10%	23%
16-20 miles	7%	5%	7%	9%	2%	4%		2%	10%	13%	5%	0%
Over 20 miles	15%	11%	8%	28%	2%	6%	6%	8%	17%	41%	23%	0%
Median	8	5	5	10	8	6	7	8	10	20	10	8

2008	TOTAL n=4706	SEA/ BAIN n=1322	SEA/ BREM n=544	EDM/ KIN n=873	FAU/ VAS n=412	FAU/SOU/VAS n=170	PTD/ TAH n=138	MUK/ CLI n=878	PTT/ KEY n=104	ANA/ SJI n=266
Less than 1 mile	1%	1%	1%	<1%	0%	1%	2%	1%	0%	3%
1-5 miles	33%	45%	48%	22%	41%	39%	33%	16%	20%	19%
6-10 miles	25%	22%	24%	20%	37%	36%	36%	29%	8%	13%
11-15 miles	14%	11%	11%	18%	21%	9%	18%	15%	9%	12%
16-20 miles	8%	7%	6%	12%	<1%	5%	0%	12%	14%	4%
Over 20 miles	20%	15%	9%	27%	<1%	10%	11%	27%	50%	49%
Median	10	6	6	13	7	6	8	12	20	20

* Caution: Small sample sizes



Demographics - Community Involvement

2010	TOTAL n=4058	SEA/ BAIN n=1084	SEA/ BREM n=458	EDM/ KIN n=768	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=757	PTT/ KEY n=85	ANA/ SJI n=201	INTER SJI n=29*
Descriptors (1 - Not at all; 10 - Completely)												
My friends and family look to me for information about corporations and other organizations	5.6	5.6	5.3	5.6	5.8	5.7	5.1	5.0	5.7	5.8	5.4	5.9
I pay attention to how organizations act in my local community	6.9	6.8	6.4	6.8	7.4	7.0	6.5	6.5	7.1	7.1	7.4	7.8
My friends and family look to me for information about local news and events	6.0	5.9	5.8	6.2	6.2	5.9	5.6	5.4	6.1	6.5	6.2	7.0
Advisory Meetings												
Ferry Advisory Committee (F.A.C.)	5%	3%	5%	6%	12%	6%	14%	13%	4%	1%	8%	4%
Washington State Ferries (W.S.F.)	12%	6%	10%	11%	25%	14%	14%	18%	14%	12%	19%	12%
Transportation Commission meetings regarding ferry fares	4%	3%	3%	2%	7%	4%	0%	5%	4%	5%	7%	7%
Other ferry specific related meetings	3%	1%	1%	3%	7%	4%	0%	2%	4%	0%	1%	4%
None of the above	85%	92%	88%	87%	70%	81%	83%	74%	82%	84%	78%	80%

* Caution: Small sample sizes



Demographics - Gender

2010	TOTAL n=4169	SEA/ BAIN n=1121	SEA/ BREM n=474	EDM/ KIN n=793	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=776	PTT/ KEY n=85	ANA/ SJI n=210	INTER SJI n=29*
Male	48%	46%	48%	45%	50%	49%	45%	59%	48%	49%	54%	64%
Female	52%	54%	52%	55%	50%	51%	55%	41%	52%	51%	46%	36%

2008	TOTAL n=3901	SEA/ BAIN n=1136	SEA/ BREM n=489	EDM/ KIN n=690	FAU/ VAS n=319	FAU/SOU/VAS n=119	PTD/ TAH n=100	MUK/ CLI n=946	PTT/ KEY n=88	ANA/ SJI n=224
Male	49%	50%	48%	51%	40%	57%	51%	51%	53%	42%
Female	51%	50%	52%	49%	60%	43%	49%	49%	47%	58%

* Caution: Small sample sizes



Demographics - Age

2010	TOTAL n=4159	SEA/ BAIN n=1118	SEA/ BREM n=474	EDM/ KIN n=791	FAU/ VAS n=377	FAU/ SOU n=152	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=775	PTT/ KEY n=85	ANA/ SJI n=209	INTER SJI n=29*
18-24	2%	2%	5%	2%	2%	0%	0%	2%	0%	1%	1%	0%
25-34	8%	7%	21%	7%	4%	4%	13%	7%	4%	4%	4%	10%
35-44	13%	16%	15%	12%	13%	16%	17%	11%	9%	10%	10%	4%
45-54	24%	23%	27%	24%	23%	32%	13%	27%	22%	22%	17%	28%
55-64	34%	33%	20%	35%	39%	36%	39%	34%	40%	40%	36%	34%
65+	20%	19%	12%	21%	19%	12%	18%	18%	25%	22%	32%	23%
Median Age	56	55	48	57	56	54	57	56	59	59	60	60

2008	TOTAL n=4813	SEA/ BAIN n=1363	SEA/ BREM n=556	EDM/ KIN n=893	FAU/ VAS n=418	FAU/SOU/VAS n=170	PTD/ TAH n=144	MUK/ CLI n=869	PTT/ KEY n=113	ANA/ SJI n=288
18-24	5%	5%	12%	3%	6%	6%	1%	2%	7%	7%
25-34	10%	9%	17%	12%	5%	15%	2%	6%	5%	17%
35-44	16%	18%	20%	12%	20%	18%	20%	12%	17%	17%
45-54	26%	27%	25%	25%	31%	25%	30%	22%	22%	23%
55-64	28%	28%	20%	29%	30%	25%	30%	33%	27%	24%
65+	15%	12%	6%	19%	8%	12%	17%	24%	21%	12%
Median Age	52	52	46	54	51	50	54	57	54	48

* Caution: Small sample sizes



Demographics - Household

2010	TOTAL n=4058	SEA/ BAIN n=1084	SEA/ BREM n=458	EDM/ KIN n=768	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=757	PTT/ KEY n=85	ANA/ SJI n=201	INTER SJI n=29*
People in Household												
1	12%	12%	17%	10%	16%	11%	23%	8%	12%	16%	10%	5%
2	54%	51%	46%	57%	49%	49%	47%	47%	61%	59%	62%	57%
3	15%	15%	18%	13%	16%	18%	18%	25%	13%	12%	14%	25%
4	13%	15%	11%	13%	15%	14%	7%	16%	8%	9%	10%	12%
5 or more	6%	6%	9%	6%	4%	8%	6%	4%	7%	5%	5%	0%
<i>Median</i>	2	2	2	2	2	2	2	2	2	2	2	2
People under 18	n=3557	n=953	n=381	n=689	n=318	n=135	n=24*	n=108	n=669	n=71	n=181	n=27*
0	73%	70%	71%	73%	69%	70%	64%	64%	79%	78%	79%	84%
1	12%	13%	15%	11%	17%	15%	20%	19%	10%	8%	11%	12%
2	11%	13%	8%	11%	12%	10%	9%	15%	7%	10%	8%	5%
3	3%	3%	4%	3%	2%	2%	7%	2%	3%	3%	2%	0%
4 or more	1%	1%	2%	2%	0%	2%	0%	0%	1%	0%	0%	0%
<i>Median</i>	2	2	1	2	1	1	1	1	2	2	1	1

* Caution: Small sample sizes



Demographics - Kid's Ferry Travel

2010	TOTAL n=966	SEA/ BAIN n=287	SEA/ BREM n=110	EDM/ KIN n=184	FAU/ VAS n=100	FAU/ SOU n=40	SOU/ VAS n=9*	PTD/ TAH n=39	MUK/ CLI n=138	PTT/ KEY n=15*	ANA/ SJI n=39	INTER SJI n=5*
Ferry travel of those under 18												
Yes, travel on ferries by themselves	34%	37%	26%	26%	48%	20%	30%	35%	39%	30%	31%	25%
Yes, travel on ferries in school bus/van	30%	36%	27%	22%	38%	9%	10%	23%	32%	18%	33%	28%
Yes, travel on ferries in church/club bus/van/car outings	18%	19%	14%	17%	23%	10%	0%	18%	19%	4%	17%	3%
No, they always travel with immediate family	51%	45%	61%	55%	37%	72%	70%	55%	45%	67%	51%	72%

* Caution: Small sample sizes



Demographics - Employment Status

2010	TOTAL n=41	SEA/ BAIN n=1111	SEA/ BREM n=467	EDM/ KIN n=771	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=117	MUK/ CLI n=765	PTT/ KEY n=83	ANA/ SJI n=207	INTER SJI n=29*
Employed full-time	56%	58%	65%	58%	58%	71%	68%	51%	49%	44%	40%	32%
Employed part-time	11%	11%	9%	10%	11%	9%	7%	19%	10%	13%	15%	27%
Student/employed	2%	1%	3%	2%	1%	0%	6%	1%	1%	3%	1%	0%
Student/not employed	1%	2%	4%	1%	1%	0%	0%	1%	0%	0%	0%	0%
Military personnel	1%	0%	2%	1%	0%	0%	0%	0%	0%	1%	0%	0%
Retired	20%	17%	10%	22%	16%	14%	8%	19%	27%	27%	32%	31%
Homemaker	3%	3%	2%	3%	1%	1%	0%	4%	3%	2%	4%	3%
Not employed	3%	3%	4%	2%	5%	2%	0%	3%	4%	5%	4%	0%
Other	4%	4%	2%	2%	7%	3%	11%	2%	5%	5%	4%	7%

2008	TOTAL n=4849	SEA/ BAIN n=1365	SEA/ BREM n=557	EDM/ KIN n=897	FAU/ VAS n=427	FAU/SOU/VAS n=170	PTD/ TAH n=144	MUK/ CLI n=893	PTT/ KEY n=113	ANA/ SJI n=284
Employed full-time	63%	66%	68%	61%	66%	69%	68%	53%	54%	59%
Employed part-time	9%	8%	6%	8%	15%	8%	9%	11%	15%	13%
Student/employed	4%	3%	7%	2%	4%	4%	2%	3%	2%	5%
Student/not employed	2%	3%	3%	1%	1%	3%	1%	1%	2%	2%
Military personnel	1%	<1%	2%	1%	<1%	1%	0%	1%	3%	<1%
Retired	16%	13%	8%	21%	8%	13%	14%	26%	20%	10%
Homemaker	3%	3%	3%	3%	1%	1%	3%	2%	1%	4%
Not employed	1%	1%	2%	1%	2%	1%	0%	1%	0%	2%
Other	2%	2%	2%	2%	2%	2%	2%	2%	3%	4%

sample sizes



Demographics - Industry

2010	TOTAL n=2767	SEA/ BAIN n=783	SEA/ BREM n=355	EDM/ KIN n=523	FAU/ VAS n=264	FAU/ SOU n=119	SOU/ VAS n=25*	PTD/ TAH n=82	MUK/ CLI n=437*	PTT/ KEY n=48	ANA/ SJI n=114	INTER SJI n=16*
Services	17%	19%	17%	15%	19%	12%	30%	22%	17%	15%	17%	21%
Healthcare	8%	7%	7%	6%	10%	13%	9%	25%	7%	11%	9%	1%
Transportation, Communications, Electric, Gas and Sanitary Services	7%	7%	9%	7%	6%	10%	5%	6%	7%	9%	8%	19%
Finance, insurance and real estate	7%	8%	8%	6%	8%	6%	0%	3%	7%	4%	6%	1%
Education	7%	4%	6%	10%	8%	5%	14%	12%	8%	5%	7%	0%
Public administration	7%	8%	9%	6%	4%	10%	9%	9%	4%	10%	6%	7%
Manufacturing	6%	3%	2%	8%	10%	8%	3%	2%	13%	2%	5%	1%
Retail trade	5%	6%	4%	5%	7%	6%	7%	2%	6%	2%	8%	1%
IT/High Tech	5%	8%	6%	3%	3%	5%	0%	2%	5%	1%	3%	0%
Construction	5%	4%	4%	6%	4%	3%	12%	3%	5%	12%	8%	2%
Federal/local government	4%	4%	7%	5%	2%	4%	0%	1%	3%	7%	2%	7%
Wholesale trade	2%	2%	1%	3%	3%	2%	0%	0%	2%	4%	3%	0%
Agriculture, forestry and fishing	1%	2%	0%	2%	2%	1%	0%	1%	1%	6%	2%	1%
Other	17%	19%	19%	17%	12%	15%	11%	13%	15%	12%	16%	40%

* Caution: Small sample sizes



Demographics - Annual Income

2010	TOTAL n=3411	SEA/ BAIN n=922	SEA/ BREM n=396	EDM/ KIN n=621	FAU/ VAS n=321	FAU/ SOU n=123	SOU/ VAS n=27*	PTD/ TAH n=98	MUK/ CLI n=635	PTT/ KEY n=72	ANA/ SJI n=168	INTER SJI n=26*
Under \$15,000	2%	2%	4%	1%	4%	0%	0%	3%	2%	2%	2%	1%
\$15,000-\$24,999	4%	3%	3%	3%	3%	2%	0%	4%	3%	9%	5%	16%
\$25,000-\$34,999	6%	3%	9%	6%	5%	1%	8%	6%	6%	8%	9%	13%
\$35,000-\$49,999	10%	7%	11%	10%	10%	10%	8%	7%	12%	16%	14%	9%
\$50,000-\$74,999	19%	16%	26%	17%	16%	22%	22%	24%	20%	28%	27%	22%
\$75,000-\$99,999	21%	21%	20%	24%	19%	24%	21%	22%	21%	12%	15%	11%
\$100,000-\$149,999	22%	24%	17%	26%	21%	24%	21%	18%	20%	20%	14%	17%
\$150,000 or more	16%	22%	9%	12%	21%	16%	19%	16%	15%	5%	12%	12%

2008	TOTAL n=3934	SEA/ BAIN n=1086	SEA/ BREM n=456	EDM/ KIN n=740	FAU/ VAS n=333	FAU/SOU/VAS n=136	PTD/ TAH n=118	MUK/ CLI n=730	PTT/ KEY n=100	ANA/ SJI n=235
Under \$15,000	3%	3%	8%	2%	1%	2%	1%	2%	7%	3%
\$15,000-\$24,999	3%	2%	5%	4%	3%	3%	1%	2%	4%	5%
\$25,000-\$34,999	6%	3%	6%	5%	10%	7%	6%	6%	11%	5%
\$35,000-\$49,999	11%	8%	13%	12%	17%	13%	7%	10%	13%	18%
\$50,000-\$74,999	23%	18%	24%	25%	23%	26%	28%	26%	25%	19%
\$75,000-\$99,999	19%	19%	20%	19%	16%	24%	29%	15%	22%	18%
\$100,000-\$149,999	21%	24%	17%	21%	22%	15%	18%	23%	13%	15%
\$150,000 or more	14%	22%	7%	12%	9%	10%	10%	15%	6%	17%

* Caution: Small sample sizes



Appendix A: Additional Conjoint Details

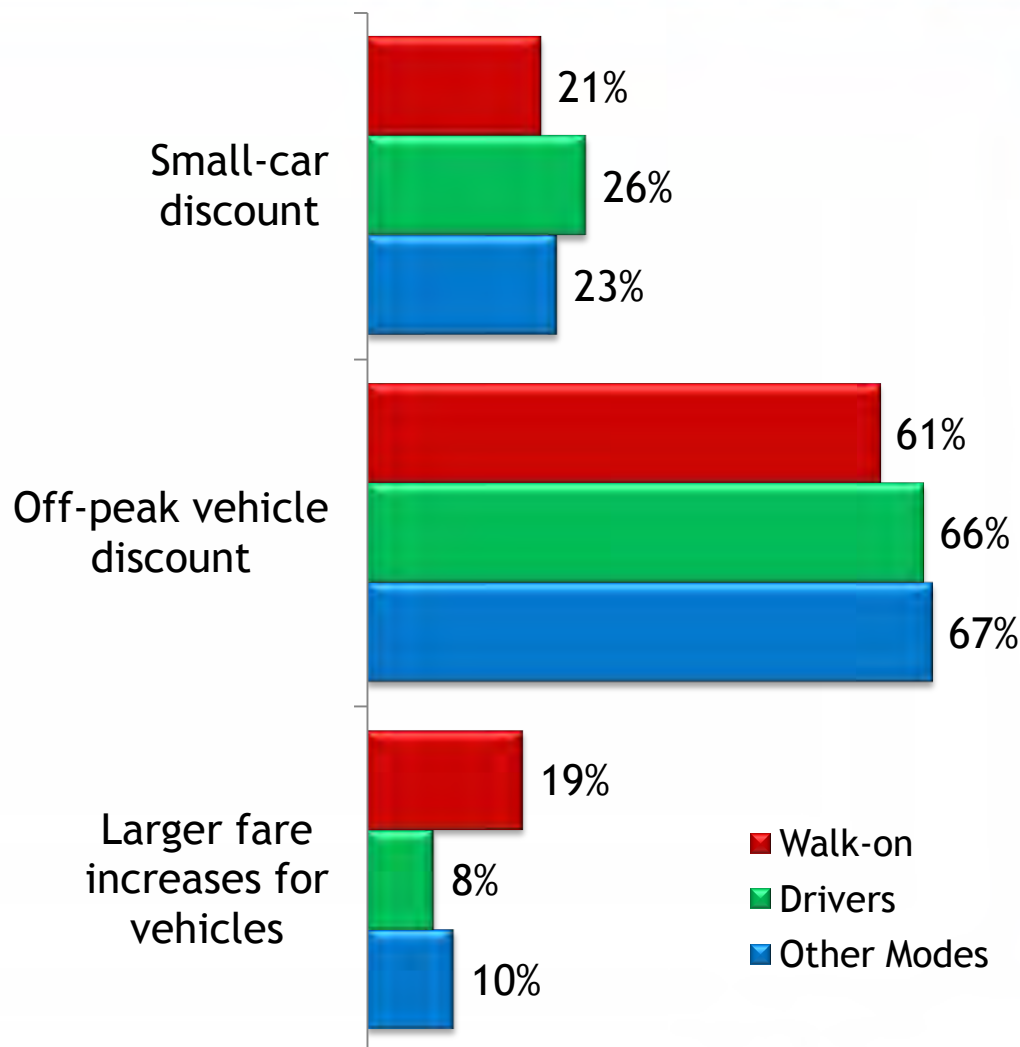


Results by Boarding Mode



Importance of the Attributes by Mode: Behavior

- ❖ Results of the “Behavior” question between those who said they drove on the ferry on their last trip and those that boarded by other modes show little difference.
- As before, the off-peak vehicle discount was the primary driver of potential behavior change.
- Larger fare increases for vehicles than passengers had less impact on drivers.

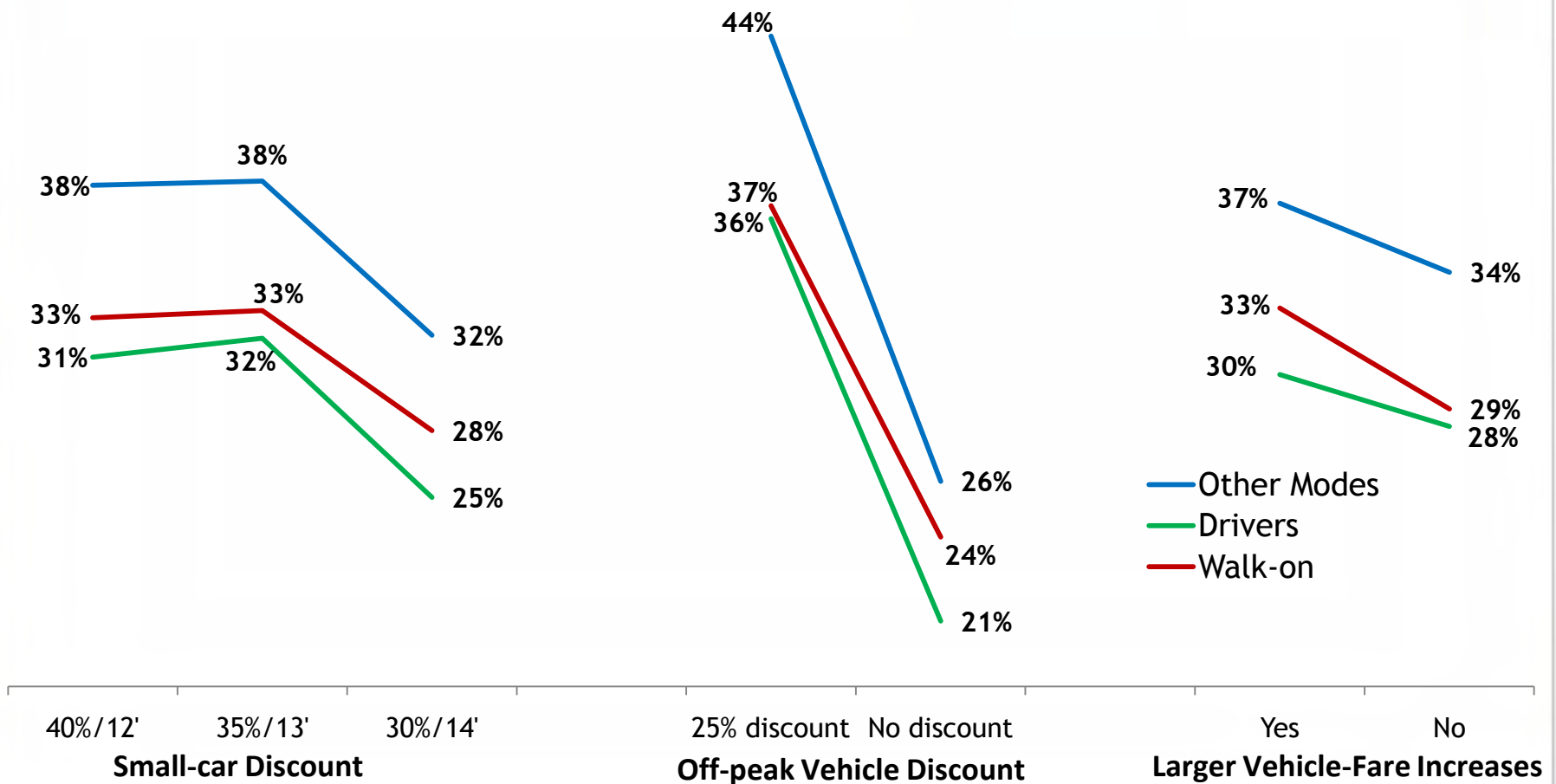




Preferences for Options - Behavior *By Mode*

❖ Preferences among the options are basically the same by mode.

Would Changed Behavior





Results by Route



Behavior - Importance of the Attributes by Route

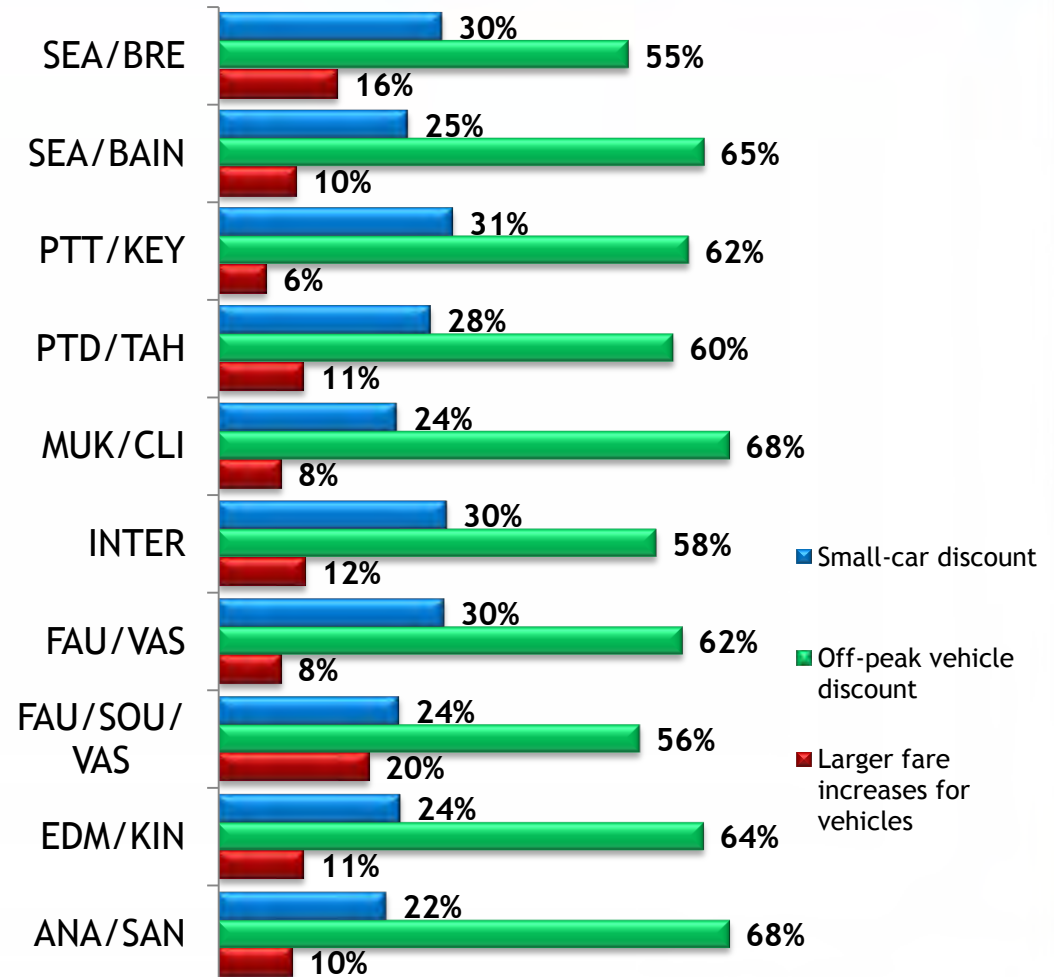
❖ The variations in the importance of the attributes by route for changing behavior generally mirror the overall results.

- The off-peak vehicle discount was the primary driver of potential behavior change for all routes.

❖ Percent who would either walk on more or shift vehicle trips to the off-peak period when the off-peak vehicle discount was included:

■ SEA/BRE	41%
■ SEA/BAIN	39%
■ PTT/KEY	42%
■ PTD/TAH	41%
■ MUK/CLI	39%
■ FAU/VAS	37%
■ FAU/SOU/VAS	27%
■ EDM/KIN	36%
■ ANA/SAN	38%
■ INTERISLAND	40%

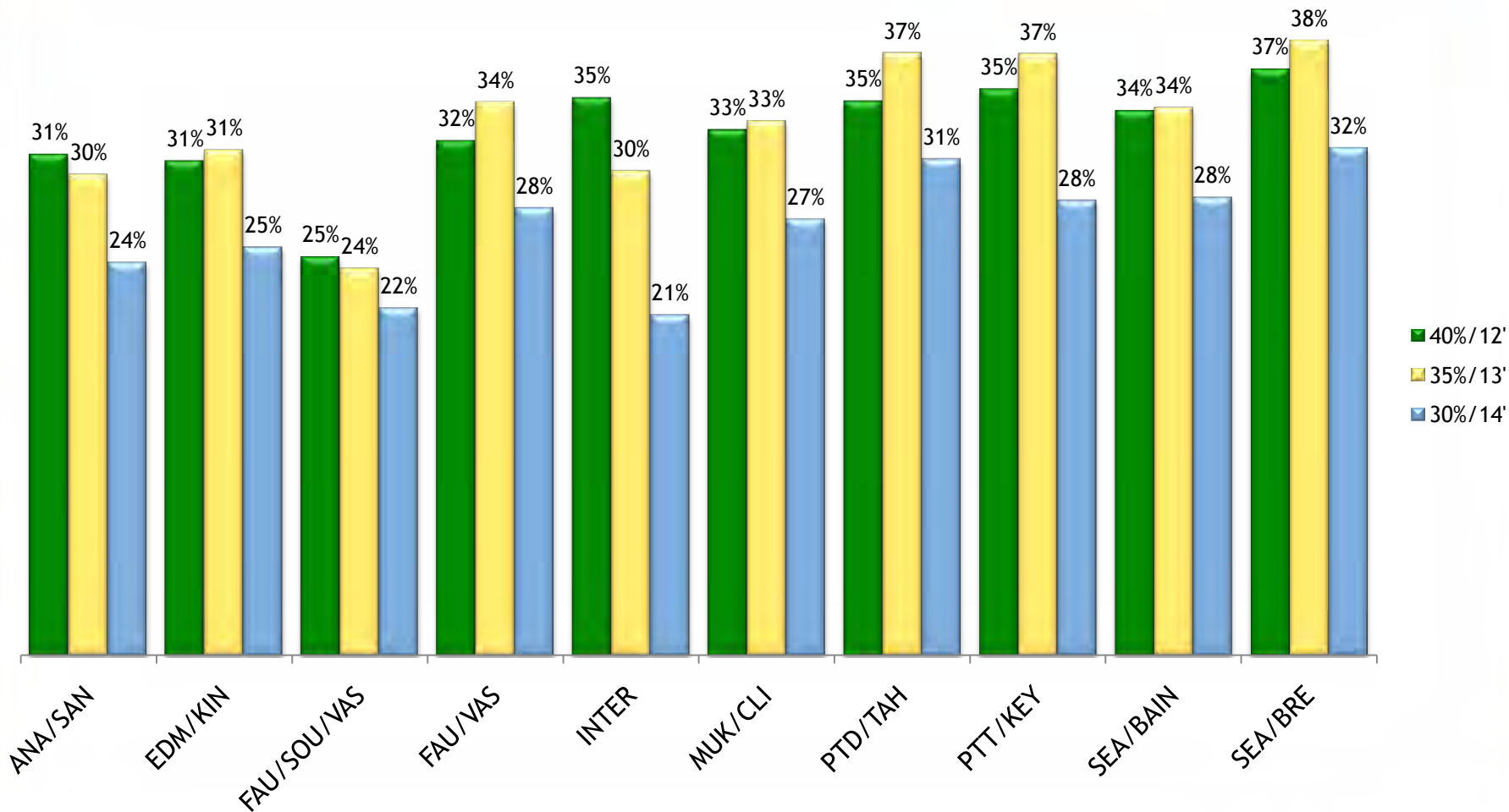
Importance of Attributes to Behavioral Change





Preferences for Small-Car Discounts by Route - Behavior

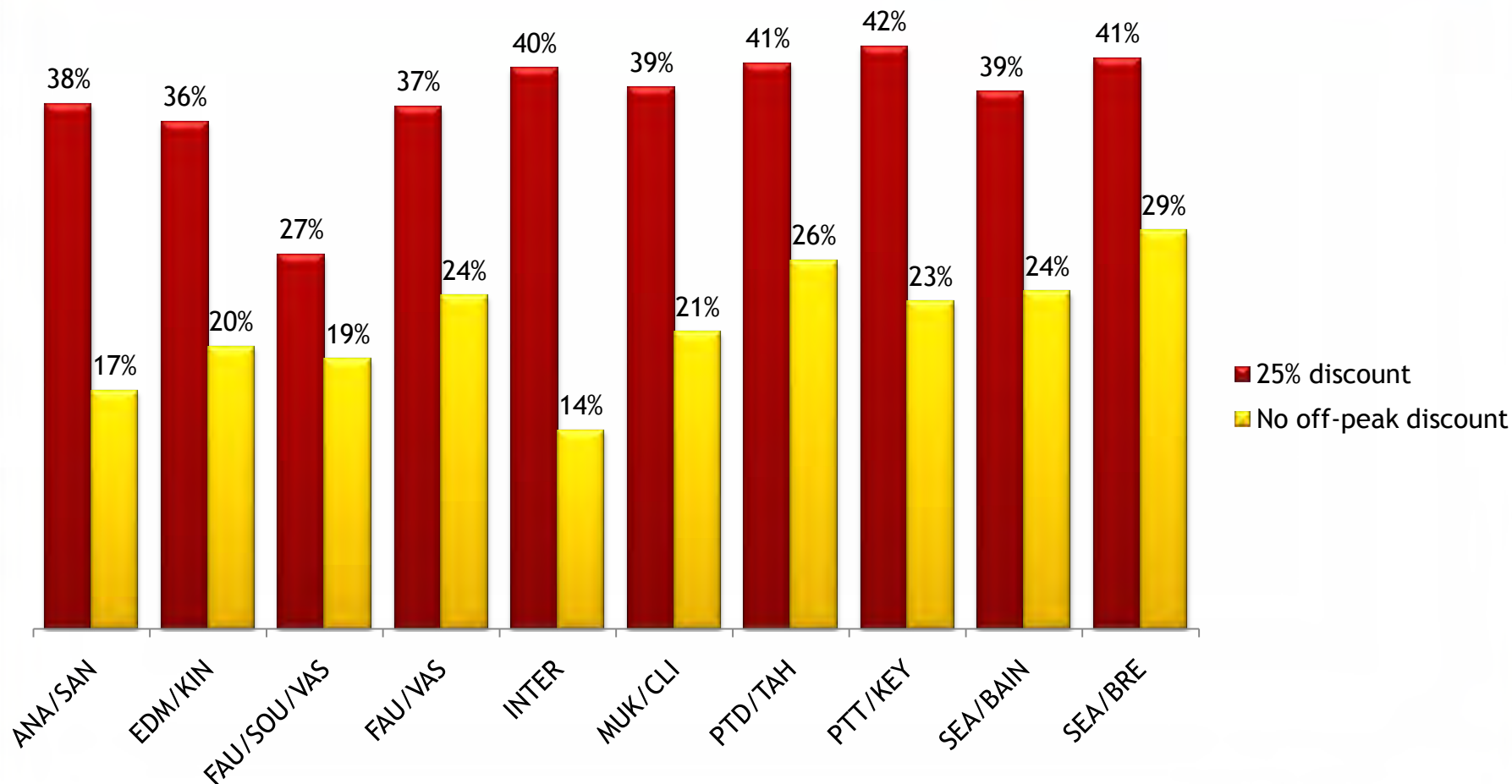
❖ Respondents are less motivated by discounts for cars 14' or less on all of the routes.





Preferences for Off-Peak Discounts by Route - Behavior

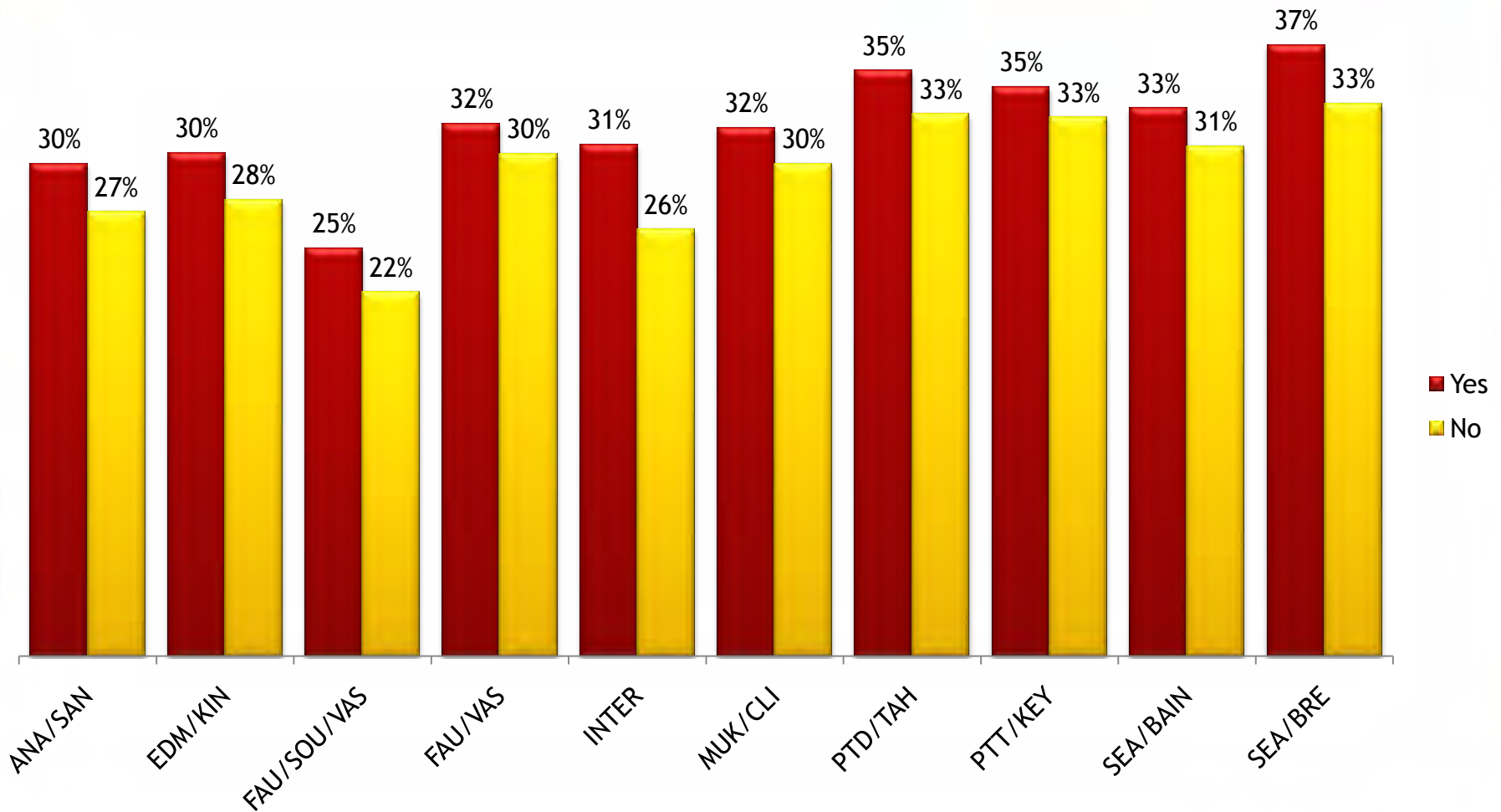
❖ Off-peak discounts show the greatest likelihood of impacting behavior on all routes.





Preferences for Larger Vehicle Fare Increases by Route - Behavior

❖ Larger fare increases for vehicles than for passengers show little potential for impacting behavior.

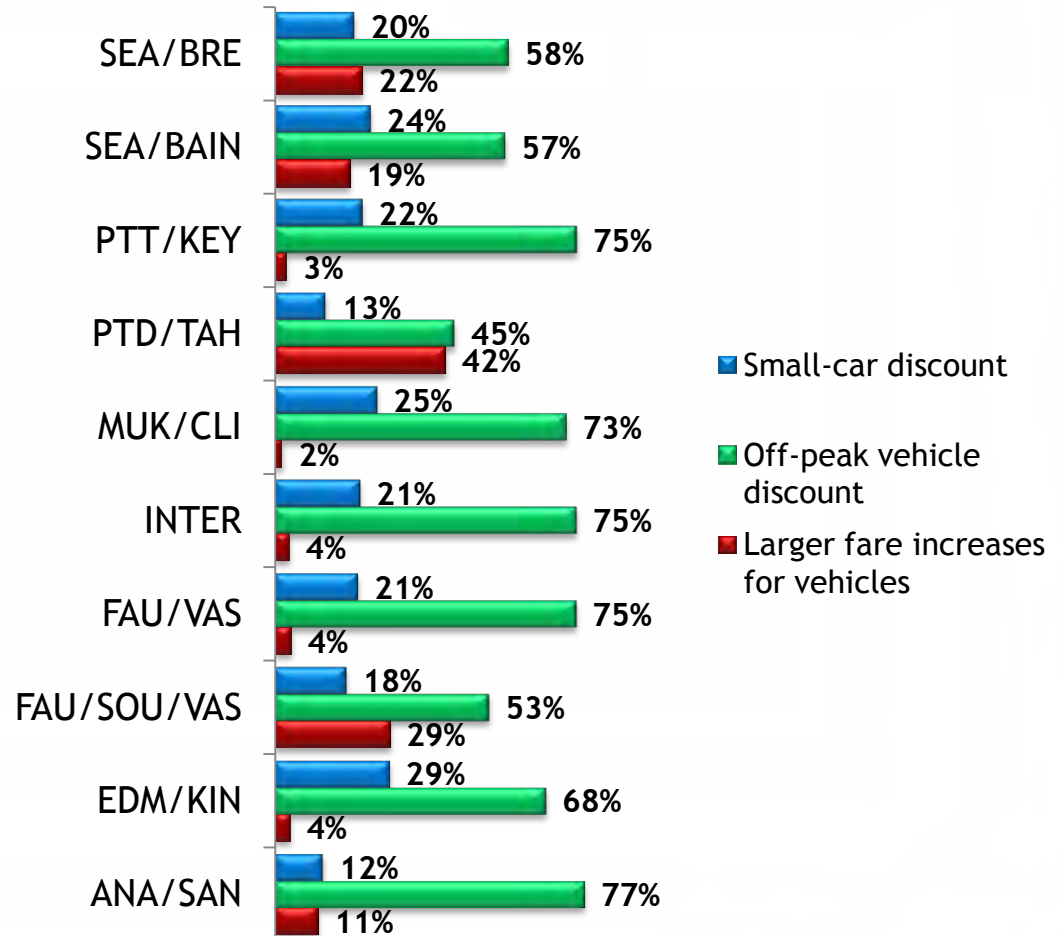




Support - Importance of the Attributes by Route

- ❖ As with changing behavior, attribute importance for support again generally mirrors the overall results.
 - The off-peak vehicle discount was the primary driver of potential behavior change for all routes except Point Defiance/Tahlequah, where it is nearly equal with larger fare increases for vehicles than for passengers.

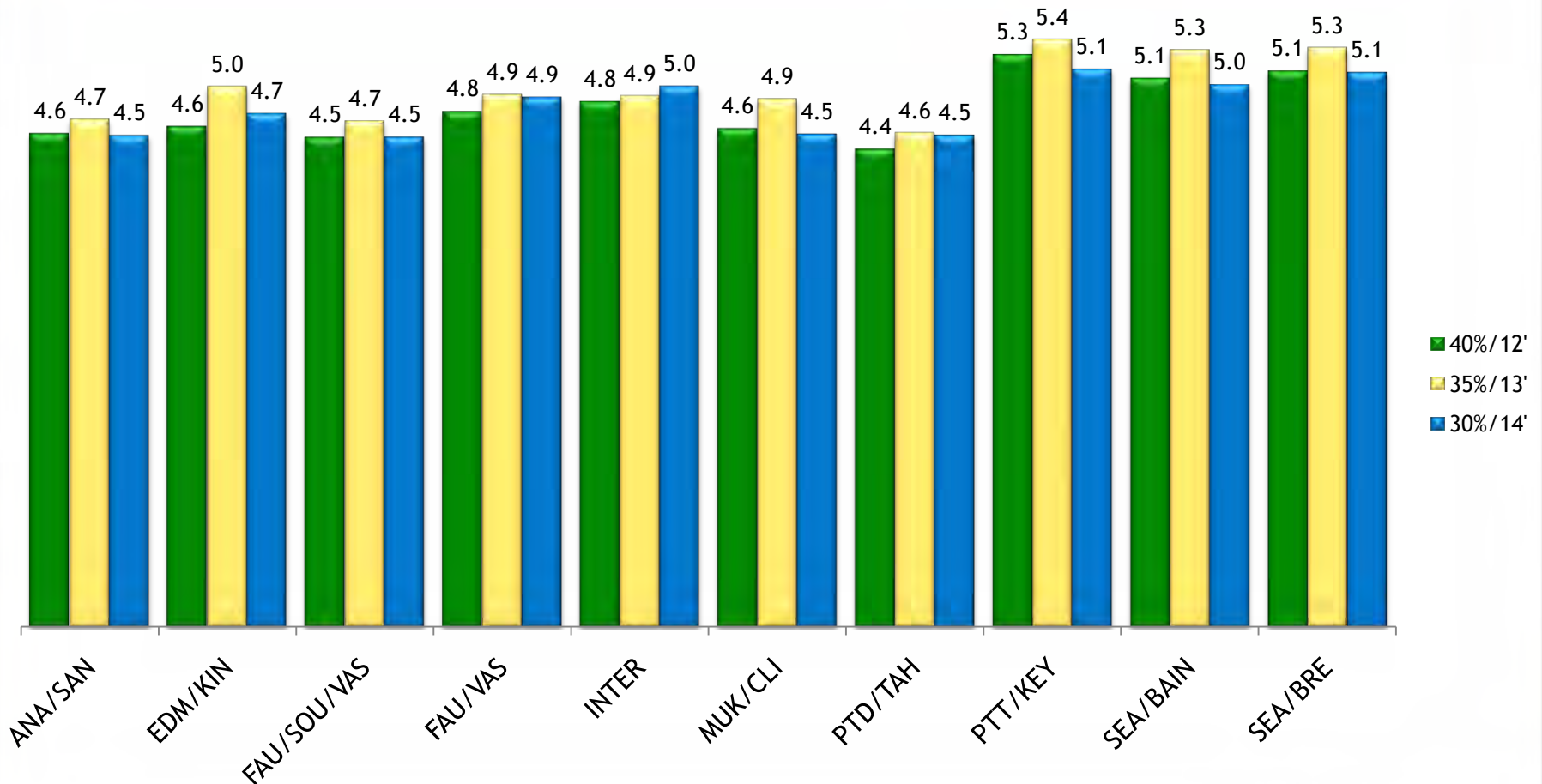
Importance of Attributes to Support





Preferences for Small-Car Discounts by Route - Support

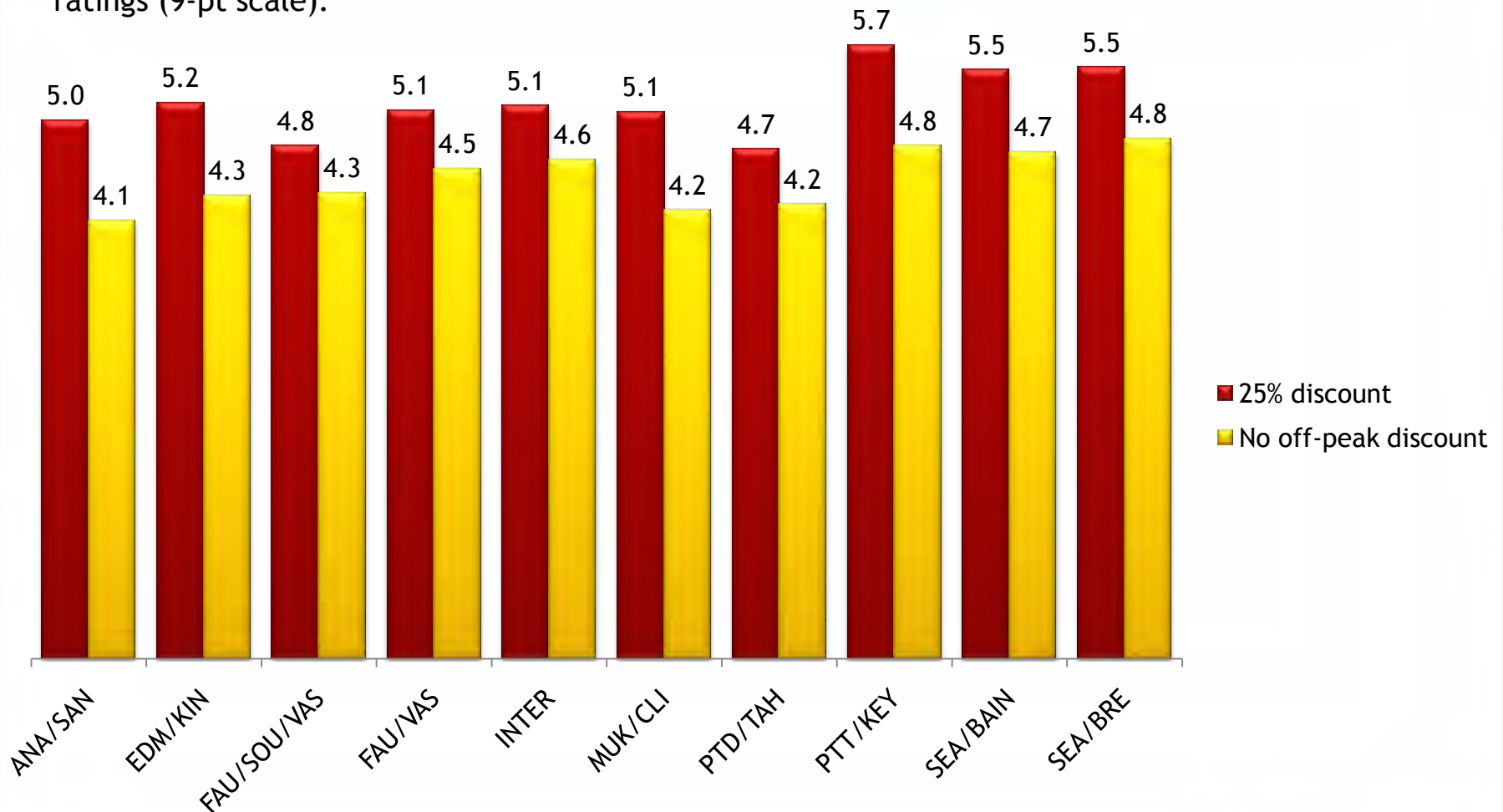
❖ Respondents are more supportive of discounts for cars 13' or less on all of the routes except Inter-Islands. The figures are the average support ratings (9-pt scale).





Preferences for Off-Peak Discounts by Route - Support

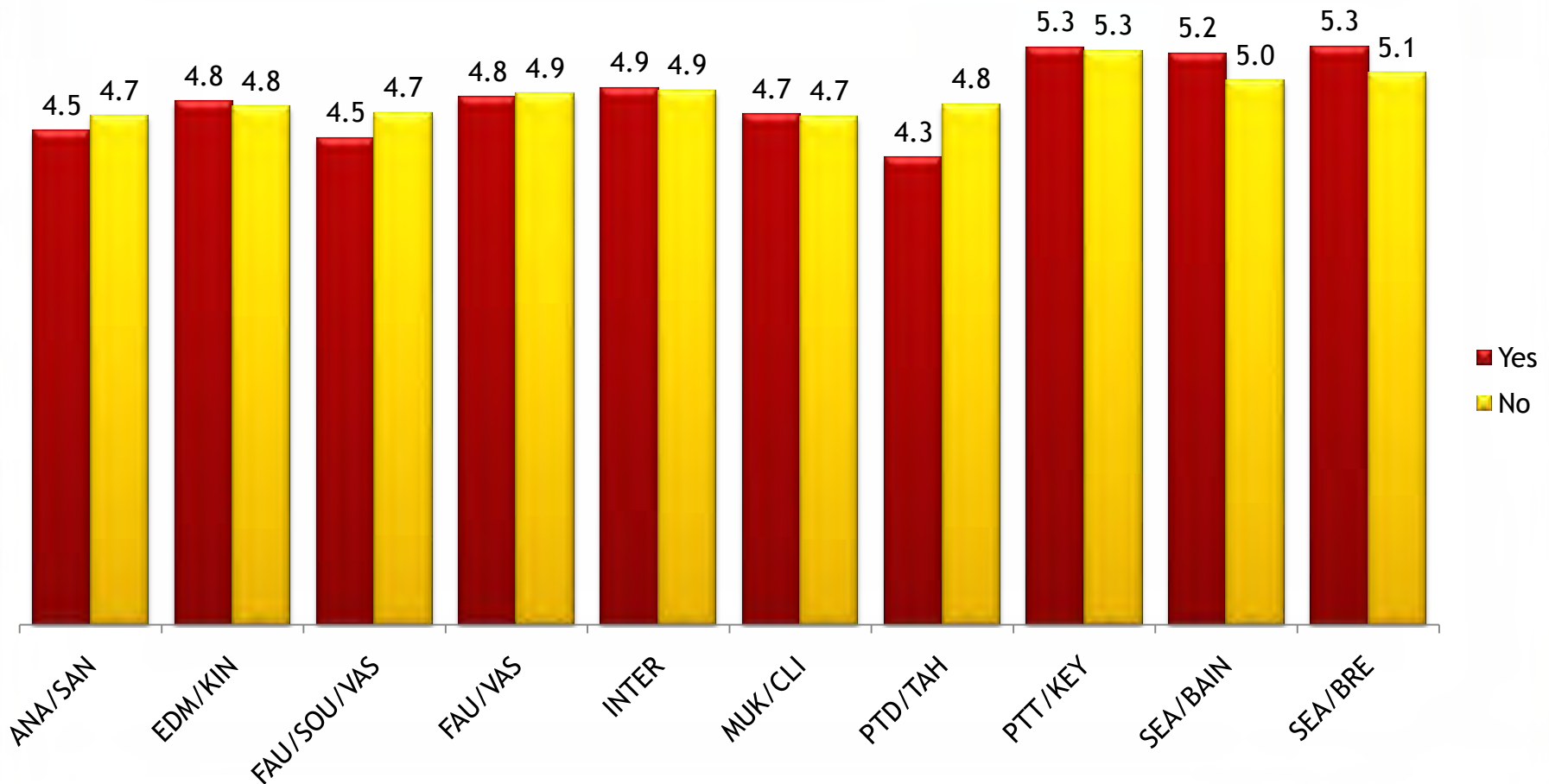
❖ Off-peak discounts have the most support on all routes. The figures are the average support ratings (9-pt scale).





Preferences for Larger Vehicle Fare Increases by Route - Support

❖ Larger fare increases for vehicles than for passengers create little additional support.





Appendix B: Questionnaire



Questionnaire



Washington State Transportation Commission

April Survey – Non-panelists (hosted online)

Final v1
April 1, 2010

INTRODUCTION SCREEN

Dear Washington State Ferries Rider:

Thank you for your interest in the Washington State Ferries and the Ferry Riders' Opinion Group (F.R.O.G.).

We greatly appreciate you taking a few minutes out of your busy day to complete this survey. This is your opportunity to voice your opinions and concerns on some important ferry issues including:

- Fare levels and pricing approaches
- Funding the ferry system
- Potential new amenities for riders

Your comments will influence critical decisions at the state level, so please join us in this important study!

Sincerely,
Carol Moser, Chairman
Washington State Transportation Commission

WINTER TRAVEL ACTIVITY

S0 To begin, we just need to collect some general information. May we please get your name?

S0A May we please have your email address?

S1 For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 3rd through March 27th.

For the routes shown below, how many round trips (two one-way trips = one round) per month do you take, on average, during the Winter Schedule period?

(PANELISTS: INSERT ROUTES TAKEN FROM PROFILING SURVEY)
(NON-PANELISTS: INSERT LIST OF ALL ROUTES)

S2 How many of those trips are for primarily commuting (getting to and from work/school) purposes?
(INSERT ROUTES TAKEN FROM Q4. RESPONSE MUST <= S1)

	# of round trips	# of commuting trips for work or school
A. Seattle/Bainbridge		
B. Seattle/Bremerton		
C. Point Defiance/Tahlequah		
D. Edmonds/Kingston		
E. Fauntleroy/Vashon		
F. Fauntleroy/Southworth		
G. Southworth/Vashon		
H. Port Townsend/Keystone		

April - Non-panel survey

1

Market Decisions Corporation

L. Mukilteo/Clinton		
J. Anacortes/San Juan Islands		
K. San Juan Inter-island		

TARIFF ISSUES (INTRODUCTION SCREEN)

In order to defer the need for more and/or larger ferries and terminals, the Transportation Commission is considering ways to manage vehicle demand and reduce congestion in peak travel periods on the ferry system.

The options being considered to manage peak period vehicle demand are:

- Discounts for vehicles significantly under the current 20-foot standard length (so we can carry more vehicles per ferry). There would be different fares for vehicles:
 - 14' or less in length (such as a Kia Rio, Hyundai Accent, VW Beetle)
 - 13' or less in length (such as a Pontiac G3, Mini Cooper, Toyota Yaris)
 - 12' or less in length (such as a Smart Car)
- Discounts for taking vehicle trips during off-peak periods; (to reduce vehicle wait time at peak hours); and
- Larger increases in vehicle fares, than for passenger fares (to encourage more car pooling and walk-on passengers).

Please note the revenue lost from offering off-peak and vehicle size discounts would be made up by increasing other fares.

On the following pages, you'll see a variety of ways these three options could be combined to accomplish the goals of reducing peak vehicle demand.

For each one, please rate 1) how supportive you would be of that option and 2) how it might impact your vehicle usage on the ferry during peak periods.

(Please press NEXT to see the first option)

Q1 Please rate how supportive you would be of using this potential option to reduce peak vehicle demand, using the following scale:

For purposes of this exercise, peak periods are defined as 5:00 – 9:00 AM Eastbound and 3:00 – 7:00 PM Westbound

Not at all supportive					Neither Supportive or Unsupportive					Very supportive	Don't know
1	2	3	4	5	6	7	8	9	97		

Q2 How might this option impact your peak period vehicle usage on the ferry if it was enacted?

If this option were in place...

- I wouldn't change anything regarding my peak period vehicle travel
- I would take fewer vehicle trips during peak periods and would travel by vehicle more during off-peak
- I would take about the same # of trips during the peak period, but would walk on only slightly more often
- I would take about the same # of trips during the peak period, but would walk on somewhat more often
- I would take about the same # of trips during the peak period, but walk on a lot more often

April - Non-panel survey

2

Market Decisions Corporation





Questionnaire (cont.)

- 6 I would travel more by vehicle during peak periods
 7 Don't know/not sure
 8 No impact as I don't take a vehicle on the ferry during peak hours (IF SELECTED DO NOT SHOW Q2 ON REMAINING PROFILES)

	1	2	3
Small-car discount	A 35% discount for vehicles 13' or less in length	A 40% discount for vehicles 12' or less in length	A 35% discount for vehicles 13' or less in length
Off-peak vehicle discount	A 25% off-peak vehicle discount offered	A 25% off-peak vehicle discount offered	No off-peak vehicle discount
Larger fare increases for vehicles	No, when fares increase the percent increase is the same for both vehicles and passengers	No, when fares increase the percent increase is the same for both vehicles and passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers
	4	5	6
Small-car discount	A 35% discount for vehicles 13' or less in length	A 30% discount for vehicles 14' or less in length	A 30% discount for vehicles 14' or less in length
Off-peak vehicle discount	A 25% off-peak vehicle discount offered	No off-peak vehicle discount	A 25% off-peak vehicle discount offered
Larger fare increases for vehicles	Yes, when fares increase, vehicle fares increase by a higher percent than passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers
	7	8	9
Small-car discount	A 30% discount for vehicles 12' or less in length	A 40% discount for vehicles 12' or less in length	A 40% discount for vehicles 12' or less in length
Off-peak vehicle discount	No off-peak vehicle discount	No off-peak vehicle discount	A 25% Off-peak vehicle discount offered
Larger fare increases for vehicles	No, when fares increase the percent increase is the same for both vehicles and passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers	Yes, when fares increase, vehicle fares increase by a higher percent than passengers

- Q3 Currently, when fuel prices go higher than what was funded in the State budget the extra cost of fuel is often paid for by taking money away from other planned transportation activities statewide.

How supportive would you be of a fuel surcharge on ferry fares to recoup some of the cost of higher than expected fuel costs?

- 5 Very supportive
 4 Somewhat supportive
 3 Neutral
 2 Somewhat against
 1 Very against
 7 No opinion/couldn't say

- Q4 If a fuel surcharge were implemented and a cap was needed to limit how high it could go, which of these do you feel would be the best way to set a maximum amount on the surcharge?

- 1 There should be no maximum amount; the surcharge should cover the extra cost of fuel
 2 It should be capped at 20% of the fare regardless of how much it covers extra fuel costs
 3 It should be capped at \$5 above the base fare regardless of how much it covers extra fuel costs
 7 Don't know/not sure

- Q5 If a fuel surcharge were implemented and these were your three options, which of these do you feel would be the most appropriate way for the surcharge to be applied?

- 1 Apply it to all single-trip fares (discounted multiple fares would not be charged the surcharge)
 2 Apply it across all fares (on both vehicle & passenger) equally
 3 Apply it to vehicles only (on both single and discounted multiple vehicle fares)
 7 Don't know/not sure

FERRY OPERATING COSTS

- Q6 There are many public services (such as golf courses, public pools, parks, etc.) where Washington State residents pay a lower fee than non-residents.

However, imposing non-resident fees can negatively impact tourism. Also, non-resident riders typically pay the highest single trip fare already during the peak summer season. Based on this information, which of these statements best describes how you would feel about introducing higher fares for out-of-state ferry passengers?

- 1 I think non-residents should be charged higher fares
 2 I do not think non-residents should be charged anymore than residents pay for a single trip fare
 → Skip to Q9
 7 No opinion/couldn't say → Skip to Q9

- Q7 What percent more should non-residents be charged than residents for ferry travel?

_____ % → An estimate is fine
 997 Don't know/couldn't say

- Q8 To verify if a person is a state or non-state resident could add to wait times at the toll booth to verify their place of residency. How supportive would you be of this type of program given that extra time would be needed to verify residency?

- 5 Very supportive
 4 Somewhat supportive
 3 Neutral
 2 Somewhat against
 1 Very against
 7 No opinion/couldn't say

(ASK FOR NON-SAN JUAN TRAVELERS)

- Q9A The summer surcharge on single-trip vehicle fares has been 25%, which means infrequent and recreational users pay a higher ticket price than those who use multi-ride discount tickets.

The Transportation Commission is looking at three options for the summer surcharge program. Given the importance of tourism and keeping fares down while managing overall costs, which of the following options would you most prefer?

- 1 Increase the summer single-trip vehicle fare surcharge from 25% to 35% and not raise any other fare types
 2 Increase summer single-trip vehicle fare surcharge from 25% to 30% and increase all other fare types by 1.25%



Questionnaire (cont.)

- 3 Leave summer single-trip vehicle fare surcharge at 25% and increase all other fare types by 2.5%
7 No opinion/couldn't say

(ASK SAN JUAN TRAVELERS)

Q9B The summer surcharge in the San Juan area on single-trip vehicle fares has been 35%, which means infrequent and recreational users pay a higher ticket price than those who use multi-ride discounts tickets.

The Transportation Commission is looking at three options for the summer surcharge program. Given the importance of tourism and keeping fares down while managing overall costs, which of the following options would you most prefer?

- 1 Increase summer single-trip vehicle fare surcharge from 35% to 45% and not raise any other fare types
2 Increase summer single-trip vehicle fare surcharge from 35% to 40% and increase all other fare types by 1.25%
3 Leave summer single-trip vehicle fare surcharge at 35% and increase all other fare types by 2.5%
7 No opinion/couldn't say

Q10 What percentage of WSP's annual operational costs do you think fares currently cover?

% → An estimate is fine
997 Don't know/couldn't say

Q11 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State.

Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

- 1 Two-thirds is an appropriate amount of the operating costs to be covered by ferry fares
2 Ferry fares should cover a higher percentage of operating costs
3 Ferry fares should cover a lower percentage of operating costs and more gas tax dollars should be diverted from currently planned statewide transportation activities to support ferry operational costs.
4 Ferry fares should cover a lower percentage of operating costs and the statewide gas tax should be increased to support ferry operational costs.
7 Don't know/couldn't say

TRANSIT CONNECTIONS

Q12 Another way to manage vehicle demand and reduce congestion in peak travel periods on the ferry system would be to make it easier and more convenient for people to utilize transit services.

What percent of your trips would you walk on during peak periods if better transit services and more reliable connections were available?

For purposes of this exercise, peak periods are 5:00 – 9:00 AM Eastbound and 3:00 – 7:00 PM Westbound

% → An estimate is fine
995 I Always walk on during peak periods
996 I Do not travel during peak periods
997 Don't know/couldn't say

Q13 What does "better transit services and more reliable connections" mean to you? → Please check all that apply

- 11 Better home to terminal connections
12 Better terminal to destination connections
13 Better Transit schedules (speed of transit, frequency of service)
14 Better availability of a seat
99 Other - specify: _____

Q14 (IF Q12=%) Of the (INSERT Q12 RESPONSE) more walk-on trips you would make if there were better transit services and more reliable connections, how would that percent be divided between...

(Note: the total of these two fields would equal 100%)

% A. Commuting (getting to and from work/school)– Trip Purpose
997 Don't know/couldn't say
% B. All other Trip Purposes
997 Don't know/couldn't say

Q15 ASKED FOR SAN JUAN FERRIES ONLY

Q15A In the early 2000s, the Anacortes to San Juan Islands fares were modified to include a price differential for those that traveled early in the week versus later. Customers purchasing a single vehicle or passenger ticket pay less if they travel Sunday through Tuesday (early week) than if they travel Wednesday through Saturday (late week). Customers utilizing multi-ride cards are not affected.

Has this early / late week fare structure influenced the days of week that you travel?

- 1 Yes – I changed the majority (over 50%) of my single fare travel to early week days
2 Yes – I changed some (10%-49%) of my single fare travel to early week days
3 Yes – I changed a little (under 10%) of my single fare travel to early week days
4 No – factors other than the price difference guide what days I travel using single-fare tickets
5 No – No change as I never use single fare tickets

Q15B Would you be in favor of eliminating the 10% early week discount (Sunday through Tuesday) for single fares?

- 1 Yes, but only if we also eliminated the 20% passenger fare peak season surcharge
2 Yes, but only if we also lowered the 35% vehicle peak season surcharge to 30%
3 No, under any circumstances



Questionnaire (cont.)

CUSTOMER SATISFACTION

Q16 We'd like to know how important some different aspects of the Washington State Ferries are to you, and how satisfied you are with these. Please rate how important each of the following items are to you, and how satisfied you currently are with each.

(Rotate)	Importance							Satisfaction						
	Not imp.				Very imp.		DK/ NA	Dis-sat.				Very sat.		DK/ NA
A. Minimal arrival time (the time you have to arrive before the sailing to secure you can get on that particular boat)	1	2	3	4	5	7		1	2	3	4	5	7	
B. On-time departures (within 5 minutes of schedule)	1	2	3	4	5	7		1	2	3	4	5	7	
C. On-board amenities and services	1	2	3	4	5	7		1	2	3	4	5	7	
D. Telephone customer service (customer support you receive when you call WSF)	1	2	3	4	5	7		1	2	3	4	5	7	
E. Interactions with terminal personnel (tollbooth and dock personnel)	1	2	3	4	5	7		1	2	3	4	5	7	
F. Interactions with vessel personnel	1	2	3	4	5	7		1	2	3	4	5	7	
G. Cleanliness of the vessels	1	2	3	4	5	7		1	2	3	4	5	7	
H. WSF website	1	2	3	4	5	7		1	2	3	4	5	7	

Q17 Listed below are some services and amenities. For each one, please indicate whether or not you use the service or amenity.

- 11 Galley service (DO NOT SHOW "GALLEY SERVICE" FOR RESPONDENTS THAT ONLY USE SAN JUAN'S FERRIES)
- 12 WiFi (DO NOT SHOW "WiFi" FOR RESPONDENTS THAT ONLY USE SAN JUAN'S FERRIES)
- 13 Vending machines
- 14 Video games
- 15 Information center (racks with brochures)
- 98 None of the above

ROTATE Q18 SERIES

(ASK if Q17=11)

Q18A How satisfied are you with the following three aspects of the galley?

	Very Dissatisfied			Very Satisfied			Don't know
A. The variety of products offered	1	2	3	4	5	7	
B. The quality of the products sold	1	2	3	4	5	7	
C. The price charged	1	2	3	4	5	7	

(ASK if Q17=12)

Q18B How satisfied are you with the following two aspects of the onboard WiFi connection?

	Very Dissatisfied			Very Satisfied			Don't know
A. The speed/quality of the onboard WiFi connection	1	2	3	4	5	7	
B. The price charged for WiFi onboard	1	2	3	4	5	7	

(ASK if Q17=13)

Q18C How satisfied are you with the following three aspects of the vending machines?

	Very Dissatisfied			Very Satisfied			Don't know
A. The variety of products offered	1	2	3	4	5	7	
B. The quality of the products sold	1	2	3	4	5	7	
C. The price charged	1	2	3	4	5	7	

(ASK if Q17=14)

Q18D How satisfied are you with the following two aspects of the video games?

	Very Dissatisfied			Very Satisfied			Don't know
A. The selection of games offered	1	2	3	4	5	7	
B. The price charged	1	2	3	4	5	7	

(ASK if Q17=15)

Q18E How satisfied are you with the information provided in the information center (rack with brochures)?

	Very Dissatisfied			Very Satisfied			Don't know
	1	2	3	4	5	7	



Questionnaire (cont.)

Q19 How interested would you be in each of the following possible new on-board services or amenities?

(Rotate)	Interest					
	None	A little	Some	Quite a bit	Very much	DK
Live entertainment on some sailings	1	2	3	4	5	7
Children's play areas	1	2	3	4	5	7
Additional retail services	1	2	3	4	5	7
Expanded galley offerings	1	2	3	4	5	7

Q20 What, if any, services or amenities would you likely use if it was offered on your ferry?

- 99 Please Specify _____
88 Nothing/cannot think of anything

OTHER TOPICS

Q21 When considering whether to drive around or take the ferry (for routes where it is feasible to drive around), which of these are key factors in your decision? → Please select all that apply

Q22 Which is the most important factor? → Please select only one

Factors	Primary
11	11 Long lines waiting to catch a ferry (so I drive around)
12	12 Heavy traffic congestion on the drive around roads (so I take ferry)
13	13 Lower cost to drive around
14	14 Lower cost to take ferry
15	15 Faster travel time to drive around
16	16 Faster travel time to take ferry
17	17 Enjoyment of trip (so I take ferry)
18	18 Enjoyment of trip (so I drive around)
99	99 Other → Please specify
77	Driving around is not a feasible option for me → SKIP TO Q23

Q23 Which of the following do you use to obtain information about Washington State Ferries? → Please check all that apply

- 11 Family/friends
12 Other ferry riders
13 TV/Radio/Newspapers
14 The WSF website
15 Weekly e-mail updates from WSF's executive director, David Moseley
16 Email alerts
17 Radio traffic reports
18 WSDOT website
99 Other → Please specify

Q24 Which of the following, if it were available, would you obtain to find information about Washington State Ferries? → Please check all that apply

- 11 A Washington State Ferries blog
12 Following Washington State Ferries on Twitter
13 Text messages from Washington State Ferries
14 A Washington State Ferries Facebook or MySpace page
15 Highway advisory radio
99 Other → Please specify

Q25 If you drive on to any ferry, do you currently use a vehicle that is...

Q26 In the next 12 months, do you plan to purchase a vehicle that is...

- | | | |
|-----|-----|--|
| Q25 | Q26 | |
| 1 | 1 | 14' or less in length (such as a Kia Rio, Hyundai Accent, VW Beetle)? |
| 2 | 2 | 13' or less in length (such as a Pontiac G3, Mini Cooper, Toyota Yaris)? |
| 3 | 3 | 12' or less in length (such as a Smart Car)? |
| 4 | 4 | A motorcycle? |
| 7 | | Do not drive onto any ferry → SKIP TO Q27 |
| | 6 | Don't plan on buying a vehicle in the next 12 months |

YOUR MOST RECENT FERRY TRIP

Q27 What was the last route that you rode?
(SHOW ONLY THOSE ROUTES MENTIONED IN S1 - ASK QUESTION ONLY IF MORE THAN ONE ROUTE TAKEN IN S1)

- 11 Seattle/Bainbridge
12 Seattle/Bremerton
13 Point Defiance/Tahlequah
14 Edmonds/Kingston
15 Fauntleroy/Vashon
16 Fauntleroy/Southworth
17 Southworth/Vashon
18 Port Townsend/Keystone
19 Mukilteo/Clinton
20 Anacortes/San Juan Islands
21 San Juan Inter-Island

Q28 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?

- 11 Commute to / from work
12 Commute to / from school
13 Work related activity / business
14 Personal Business / activity
15 Medical appointments
16 Everyday shopping
17 Major shopping
18 Tourism / recreation
19 Travel to / from special event
20 Travel to / from to see family / friends
99 Other → Please specify



Questionnaire (cont.)

Q29 Thinking about your **LAST FERRY RIDE ONLY**, were you the vehicle driver, a passenger in a vehicle, or did you walk onto the ferry? (if you boarded differently coming and going mark both below)

- 11 Vehicle driver
- 12 Passenger in a vehicle
- 13 Walk-on
- 14 Rode on in bus/transit
- 15 Rode on in van/car pool
- 16 Rode on - motorcycle
- 17 Biked on

Q29a Do you have any additional feedback you would like to share with the Washington State Transportation Commission?

88 No additional feedback

99 Yes → _____

Q30 Are you interested in joining the Ferry Riders' Opinion Group (F.R.O.G.)? If yes, we will send you an email within 24 hours with a link to join the group.

- 1 Yes
- 2 No

PROFILING SURVEY QUESTIONS

P1 What is your gender?

- 1 Male
- 2 Female

P2 When is your birthday?

Month: _____ Year: _____

P3 How many years have you been riding the ferries?

- 1 This was the first time I have ever ridden
- 2 Less than one year
- 3 1 year, but less than 3 years
- 4 3 years, but less than 6 years
- 5 6 years, but less than 10 years
- 6 More than 10 years

P4 Since you started riding the ferries, has the frequency with which you ride...

Increased Significantly	Increased Somewhat	No change at all	Decreased Somewhat	Decreased Significantly
5	4	3	2	1

P5 Overall, how satisfied are you with Washington State Ferries?

- 5 Extremely satisfied
- 4 Somewhat satisfied

April - Non-panel survey

11

Market Decisions Corporation

- 3 Neither satisfied nor dissatisfied
- 2 Somewhat dissatisfied
- 1 Extremely dissatisfied

P6 Considering your personal experience with the ferries, which of the following phrases best describes the value, to you, of riding Washington State Ferries? "Value" means what you receive for the amount you pay. Are Washington State Ferries...?

- 5 A very good value
- 4 A good value
- 3 Neither a good nor poor value
- 2 A poor value
- 1 A very poor value

P7 Washington State Ferries is currently both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a People-Mover (vehicles are secondary) or a Vehicle-Mover (people are secondary) system?

Strongly think it should invest in being a PEOPLE-MOVER system	Invest Equally	Strongly think it should invest in being a VEHICLE-MOVER system
7 6	5 4	3 2 1

DEMOGRAPHICS

D1 Approximately how many miles do you live from the ferry terminal?

RECORD: _____

D2 What is your home zip code?

RECORD: _____

D3 For each of the following statements please indicate how well it describes you, using a scale where 10 means "describes me completely" and 1 means "does not describe me at all."

Please circle one number per line	Does not describe me at all	Describes me completely
My friends and family look to me for information about corporations and other organizations	1 2 3 4 5 6 7 8 9 10	
I pay attention to how organizations act in my local community	1 2 3 4 5 6 7 8 9 10	
My friends and family look to me for information about local news and events	1 2 3 4 5 6 7 8 9 10	

D4 In the last 12 months, which of the following meetings have you attended? SELECT ALL THAT APPLY

- 11 Ferry Advisory Committee (F.A.C.) meetings
- 12 Washington State Ferries (W.S.F.) public meetings
- 13 Transportation Commission meetings regarding ferry fares
- 99 Other ferry specific related meetings (Please specify) _____
- 98 None of the above

April - Non-panel survey

12

Market Decisions Corporation



Questionnaire (cont.)

D5 How many people live in your household, including you?

RECORD: _____

D6 (ASK D6 IF D5 >1) How many of those people are under the age of 18?

RECORD: _____

D7 (ASK D7 IF D6 >1) Have any of the people under 18 who live in your household ever travel the ferry without the immediate family? (CHECK ALL THAT APPLY/CHECK ALL THAT APPLY)

- 1 Yes – Travel on ferries by themselves
- 2 Yes – Travel on ferries in school bus/van
- 3 Yes – Travel on ferries in church/dub bus/van/car outings
- 4 No – They always travel with immediate family

D8 What is your current employment status?

- 11 Employed full-time
- 12 Employed part-time
- 13 Student and employed
- 14 Student and not employed
- 15 Military personnel
- 16 Retired
- 17 Homemaker
- 18 Not currently employed
- 99 Other (please specify): _____
- 98 Prefer not to answer

D8a (ASK IF D8=11,12,13) In which of the following industries do you work?

- 11 Agriculture, Forestry, And Fishing
- 12 Mining
- 13 Construction
- 14 Manufacturing
- 15 Transportation, Communications, Electric, Gas, And Sanitary Services
- 16 Wholesale Trade
- 17 Retail Trade
- 18 Finance, Insurance, And Real Estate
- 19 Services
- 20 Public Administration
- 21 Washington State Ferry (WSF)
- 99 Other – please specify

D9 Which of the following ranges best describes your total annual household income before taxes?

- 11 Under \$15,000
- 12 \$15,000 to \$24,999
- 13 \$25,000 to \$34,999
- 14 \$35,000 to \$49,999
- 15 \$50,000 to \$74,999
- 16 \$75,000 to \$99,999
- 17 \$100,000 to \$149,999
- 18 \$150,000 or more
- 98 Prefer not to answer

D10 Please enter your area code and telephone number:

END: Dear (INSERT FIRST NAME FROM PROFILE or FIRST NAME FROM MDC WEB SURVEY OF NON-PANELIST or Wa. State Ferry Rider – IF BOTH FIRST NAMES ARE BLANK);

Thank you for completing this survey. We are very appreciative of the time you have taken to give us your honest opinions about the Washington State Ferry System.

Your opinion and those of your fellow riders do guide our decisions and hopefully will result in a better ferry system for everyone.

Again, thank you.

Sincerely,
Carol Moser, Chairman
Washington State Transportation Commission

PS: Over the next year, we will be conducting several short surveys on "Funding for new boats," "Potential Reservation Systems," "Possible Fare Structure Changes," and other issues that we hope you will weigh in on.





Appendix C: Weighting



Weighting Methodology

- ❖ In order to make the survey results proportionate to the ferry ridership universe as a whole, it was necessary to weight the data by route and boarding method based on their last trip taken. The weighting scheme used is displayed below.

Route	Vehicle	Passenger	Walk on
SEA/BAIN	1.122807	3.200000	0.989858
SEA/BRE	0.670051	1.306122	1.006231
PTD/TAH	0.675676	2.909091	1.230769
EDM/KIN	1.162162	2.823529	0.750000
FAU/VAS	0.953782	2.000000	1.020408
FAU/SOU	0.605096	1.333333	0.444444
SOU/VAS	0.863636	0.000000	1.333333
PTT/KEY	0.567568	2.727273	0.619048
MUK/CLI	0.812500	1.974359	0.673611
ANA/SAN	0.400000	1.112676	0.529412
INTER SJI	1.000000	2.000000	0.130435